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A SURVEY OF EXTERNAL ASSISTANCE TO THE FISHERIES SECTOR IN DEVELOPING COUNTRIES

1978 to 1984

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Rome, August 1984

PREPARATION OF THIS PAPER

This document is a compilation of data collected from UNDP's publications, donor agencies, FAO sources and specialized economic publications. The data shown are therefore not necessarily complete but do give an indication of trends and main fields of assistance to the fishery sector of developing countries. Subjective allocations between groups of activities have sometimes had to be made after a closer review of the objectives of multi-activity projects. The period of analysis is 1978 to 1984 based on information available up to May 1984.

ABSTRACT

This paper analyzes data concerning foreign assistance to the fisheries sector of developing countries from 1978 to 1984. The analysis was carried out by type of activity assisted by external donors, through technical or capital aid. Differences between regional allocation of aid and between the various donor agencies and recipient countries were worked out in detailed tables.

W/R0231

For bibliographic purposes this document should be cited as follows:

Josupeit, H., 1984 A survey of external assistance to the fisheries sector in developing countries, 1978 to 1984. FAO Fish.Circ., (755) Rev.1:53 p.

FAO Fisheries Circular (FAO Fish.Circ.)

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PREFACE

Many developing countries do not presently have the physical capacities nor technical expertise to take advantage of the opportunities offered by the national control over waters. They lack the skills in many of the different disciplines that are required for the rational management and optimum utilization of a resource. Many countries may also lack the resources of capital or trained manpower required to establish new fishing fleets, processing plants and distribution chains. External aid is therefore often needed to enhance such technical expertise, and to acquire funds for new vessels, plants and associated infrastructure.

International and national development assistance agencies have responded to this need by means of both technical assistance and capital aid projects. The UNDP and other United Nations agencies, the World Bank, the regional development banks, regional economic groups and the development aid agencies of individual states have variously contributed to this response.

The present paper is an up-dating of a survey carried out from 1979 to 1981. As far as possible, the tabulated data is allowed to speak for itself; an attempt has been made to keep the written text and commentary to a minimum. Only the global tables are inserted in the text; the detailed tabulations are placed in the Statistical Appendix. Interregional, regional and global projects are this time included in the general tables.

The data were collected from questionnaires and other correspondence from the donor agencies, supplemented by special inputs from UNDP's and FAO's own data-collection systems, information provided by FAO's field project staff and cross-checks and follow-ups of aid projects variously reported in the international fisheries press and elsewhere. In all, data regarding over 1 600 fisheries aid projects were collected and analysed. However, in view of the fact that in some instances secondary sources of information were used, data on bilateral assistance are not exhaustive.

The paper provides data on the external flow of aid to the fisheries sector in developing countries by donors, regions, type of project and type of country. A general summary of the data is given for the years 1974 to 1984; the detailed analyses relate to the period 1978 to 1984. For purposes of calculation, the money allocated to each project has been apportioned to each year according to the project duration.

The analysis attempts to distinguish between capital aid (projects providing loans or direct capital inputs for vessel equipment, ports, infrastructures, etc.) and technical assistance (advice and training in fisheries research, planning, production, technology, processing, etc.). Whenever such a distinction was not clearly identifiable, in terms of the financial aid channelled to one or the other, the whole amount of the project cost has been classified under capital aid. Aid provided by the UNDP and other UN agencies such as UNICEF, UNIDO, UNCDF, by the World Bank and the regional development banks is classified as "multilateral assistance". Aid provided by the development assistance agencies of individual countries is classified as "bilateral assistance". Data regarding EEC and OPEC are reported separately. It should be noted that the survey did not extend to technical, capital or other assistance provided to the fishery sectors of developing countries by private, commercial enterprises or under joint ventures.

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1. INTRODUCTION AND GENERAL SUMMARY

The evidence available from the survey indicates that external aid to the fisheries sector of developing countries - in absolute terms - rose to US$ 475 million in 1983, representing a more than threefold increase over 1974 and 1975 (see Table 1). However, as shown in Table 2, which adjusts the year by year data to a common 1978 value basis, using the ODA deflator, the real increase in the flow of aid was lower, i.e., about 100 percent over the ten-year period. The share of assistance to the fisheries sector in total development aid has remained stable at 3 percent of total which, to give a comparison, is also the fisheries average share in the GDP of developing countries.

Capital aid has increased its share in total assistance to fisheries from 75 percent in 1974 to 80 percent in 1983, reflecting in particular substantial investment projects of the Inter-American Development Bank (IDB) in Mexico, Brazil, Chile and Peru, and by Japan for port construction in Indonesia and the Philippines.

Technical assistance increased relatively less, reaching a peak in 1979 and in 1982. While multilateral technical assistance remained stable at 1979 levels, increased interest by the European Community and bilateral donors, especially Japan, were responsible for the peak of technical assistance in 1982.

Though bilateral capital aid has increased steadily through the period 1974-82, in absolute terms, its share in total capital aid has become less important; in fact in 1982 multilateral capital aid outstripped bilateral capital aid.

Global, interregional and regional assistance to the fisheries sector is mainly channelled through FAO. While total interregional and regional assistance is stable at about US$ 17 million, a sharp decrease in UNDP funds for interregional or regional projects has to be noticed. Important regional projects like the South China Sea Programme or the CECAF Programme are coming to an end because of shortage of UNDP funding. Trust Fund projects by bilateral donors channelled through FAO are counterbalancing this trend. An important regional Trust Fund project is the "Integrated Small-Scale Fisheries Project in West Africa" funded by Danish and Norwegian trust funds.

The further analysis which follows in this and other sections of the paper concentrates on the years 1978 to 1984, for which more detailed data are available permitting the more accurate identification of donors, sub-regions and objectives of projects.

Table 4 presents the regional flow of fisheries assistance. Asia receives almost 40 percent of the total, Africa 28 percent, Latin America about 20 percent, Near East 9 percent, the balance is going to Oceania and the Caribbean. The specific attention given to Asia is understandable, as fish represents in many Asian countries more than 50 percent of animal protein supplies. Asia also accounts for about two-thirds of the total fish catch by developing countries. However, assistance going to Asian fisheries remained stable at the 1980 level, while in Latin America, the Near East, and to a certain extent Africa, the amount of assistance going into the fisheries sector increased sharply.

Table 1

Concessionary Aid to Fisheries in Developing Countries
at current values (million US$)

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984[a/]
TECHNICAL ASSISTANCE	35.2	47.2	53.8	47.8	65.4	91.8	88.7	85.7	100.5	94.6	74.9
Multilateral	9.9	16.8	17.4	17.1	25.9	38.0	39.5	37.2	39.6	37.6	29.0
EEC	-	-	-	0.0	0.5	1.3	2.0	4.1	4.8	5.7	8.0
OPEC	0.3	0.3	0.2	0.1	0.1	0.1	0.2	0.2	0.5	0.1	0.1
Bilateral	25.0	30.1	35.8	30.6	38.9	52.4	47.1	44.4	55.6	51.2	37.9
CAPITAL AID	104.4	89.4	111.9	115.6	136.2	207.4	262.9	317.7	368.6	380.6	328.5
Multilateral	80.4	47.4	58.0	55.7	50.2	79.3	112.6	137.8	174.5	193.1	189.1
EEC	0.9	1.0	1.4	1.4	1.5	4.1	6.5	11.6	7.9	9.8	13.8
OPEC	9.7	15.0	15.5	7.0	8.9	10.1	21.7	17.1	20.0	18.8	17.6
Bilateral	13.4	26.0	37.0	51.5	75.6	113.9	122.1	151.2	166.3	158.8	108.0
Total:	139.6	136.6	165.7	163.4	201.6	299.2	351.6	403.4	469.1	475.2	403.4

Table 2

Concessionary Aid to Fisheries in Developing Countries
in deflated 1978 US$ and annual variations(million US$)

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983
TECHNICAL ASSISTANCE	50.3	65.5	68.9	53.7	65.4	82.7	73.9	72.0	85.2	80.9
Annual variation (%)		+30	+5	-12	+22	+26	-11	-3	+18	-5
CAPITAL AID	149.2	124.1	143.3	129.9	136.2	186.8	219.1	267.0	312.4	325.3
Annual variation (%)		-17	+15	-10	+5	+37	+17	+22	+17	+4
Total:	199.5	189.6	212.2	183.6	201.6	269.5	293.5	339.0	397.6	406.2
Annual variation (%)		-5	+12	-13	+10	+34	+9	+16	+17	+2

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a/ preliminary

Table 3

Global, Interregional and Regional Assistance to the Fisheries Sector (US$'000) 1978-84

	1978	1979	1980	1981	1982	1983	1984[a/]
TECHNICAL AID	7 850	12 763	16 672	17 876	16 819	17 420	14 101
Multilateral	6 686	10 359	14 170	14 595	13 624	13 480	11 361
EEC	0	0	350	1 000	1 100	2 240	1 850
OPEC	0	0	0	0	0	0	0
Bilateral	1 164	2 404	2 152	2 281	2 095	1 700	890
CAPITAL AID	0	45	45	45	45	0	0
Multilateral	0	0	0	0	0	0	0
EEC	0	45	45	45	45	0	0
OPEC	0	0	0	0	0	0	0
Bilateral	0	0	0	0	0	0	0
Total Aid:	7 850	12 808	16 717	17 921	16 864	17 420	14 101

Table 4

Total Assistance to the Fisheries Sector by region (US$'000)

	Africa	Asia	Latin America	Oceania	Near East	Caribbean
1978	51 219	98 469	29 108	3 453	13 127	3 519
1979	75 576	146 571	41 803	7 965	18 807	4 627
1980	81 653	173 573	56 140	7 886	21 380	4 761
1981	102 119	176 610	59 193	9 548	42 265	6 722
1982	120 701	178 499	101 036	12 267	44 799	6 003
1983	134 804	177 071	93 130	12 637	44 896	7 288
1984[a/]	100 779	150 182	82 516	11 176	46 094	6 462

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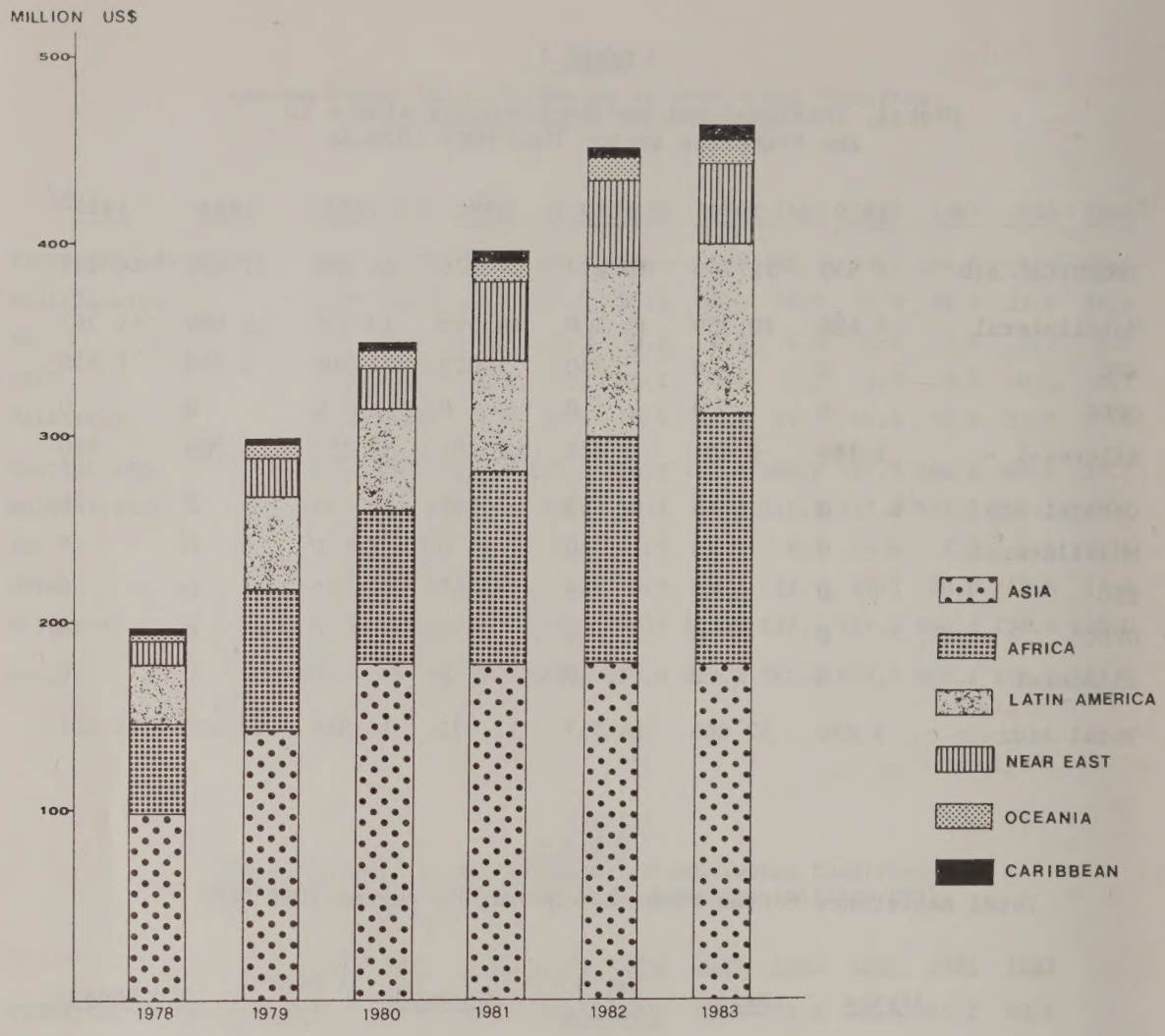

Fig. 1 Regional distribution of fisheries aid

In Tables 5 and 6 the aid figures are compared with different population densities and the number of fishermen in the various regions.

Table 5

Total fisheries assistance per 1 000 inhabitants by region (excluding China) (US$)

	Africa	Asia	Latin America	Oceania	Near East	Caribbean
1978	155	83	84	691	50	117
1979	206	121	118	1 594	69	152
1980	216	140	154	1 578	76	154
1981	262	140	159	1 910	147	214
1982	300	137	265	2 455	151	189
1983	326	133	238	2 477	147	226
1984[a/]	238	112	207	2 191	148	197

Oceania is receiving more aid per caput than the other regions which perhaps reflects the primary importance of the fishing industry in some of the countries of the region as well as the relatively small population of these islands.

Table 6

Total assistance to the fisheries sector per fisherman, by region (US$)

	Africa	Asia	Latin America	Oceania	Near East	Caribbean
1978	34	18	40	38	55	47
1979	50	27	58	97	80	61
1980	54	32	78	88	96	63
1981	68	33	83	114	203	89
1982	80	33	139	135	188	80
1983	80	33	128	139	188	97
1984[a/]	67	28	113	123	194	86

This table shows that the Near East receives relatively more aid for each fisherman than the other regions. The figures for Asia reflect the very large number of fishermen in the region.

Further detailed breakdowns of aid flows regionally and sub-regionally may be found in Chapter 5 and in the Statistical Appendix.

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a/ preliminary

2. DISTRIBUTION OF AID BY SUBJECT MATTER

The analysis of aid, especially technical assistance, into sub-sectoral activities or type of project presents some difficulties. Capital aid to purchase a fishing vessel, for example, is simple to categorize; similarly, there are no problems in categorizing a one-man technical assistance project where the expert's terms of reference clearly and simply relate to, say, advice and assistance in aquaculture. Some aid projects, however, embrace within their objectives a whole range of activities, technologies and disciplines. For example, the so-called integrated fishery development projects can embrace fisheries biology and research, fishing technology, marine engineering, processing and marketing, and economics/planning. In preparing this section, subjective allocations have thus sometimes had to be made after a closer review of the objectives of multi-activity projects. Table 7 presents estimates of the distribution of external aid by type of project, according to 23 broad activities covered by fisheries aid projects, further aggregated in eight groups (Table 8).

Table 7

Distribution of Aid by Type of Assistance (US$'000)

	1978	1979	1980	1981	1982	1983	1984[a/]
I. Research	21 396	33 517	37 349	56 909	40 773	35 788	28 773
Pollution control	82	338	340	339	325	286	230
II. Small-Scale fisheries	21 216	32 647	35 415	37 946	57 596	65 533	59 353
Cooperatives	3 562	3 669	2 693	2 111	2 334	453	0
Credit	5 071	5 946	19 448	19 448	5 515	5 855	2 480
Motorization schemes	2 721	6 672	5 487	8 020	9 908	6 953	6 420
III. Industrial fisheries	37 630	46 483	38 098	38 217	76 100	79 612	80 825
IV. Ports	28 198	26 819	40 384	61 986	86 210	79 872	62 721
Vessels	27 812	53 849	60 818	60 886	39 622	47 017	33 051
Repair yards	0	3 000	3 000	3 000	3 100	100	0
Boatbuilding	6 798	6 901	6 005	6 527	1 441	536	0
Equipment	1 218	5 433	4 969	4 493	9 003	7 806	5 409
V. Marketing	2 219	3 039	6 202	4 252	6 428	5 342	5 692
Processing	1 004	1 701	1 651	4 258	3 927	7 139	8 810
Ice plant	7 596	11 937	14 096	9 684	12 091	11 080	3 070
Nutrition	0	0	200	222	15	0	130
VI. Aquaculture	16 792	31 607	47 193	56 278	71 262	75 324	69 511
VII. Economics/Planning	4 420	6 312	7 106	7 339	8 910	8 781	5 390
Monitoring/Surveillance	5 396	5 396	8 586	3 190	3 330	3 290	3 040
EEZ	80	1 143	1 305	1 329	5 618	4 675	4 205
Feasibility studies	1 251	2 653	501	550	1 393	613	50
VIII. Training	7 018	9 936	10 778	16 010	24 189	29 121	24 303

[a/] Preliminary

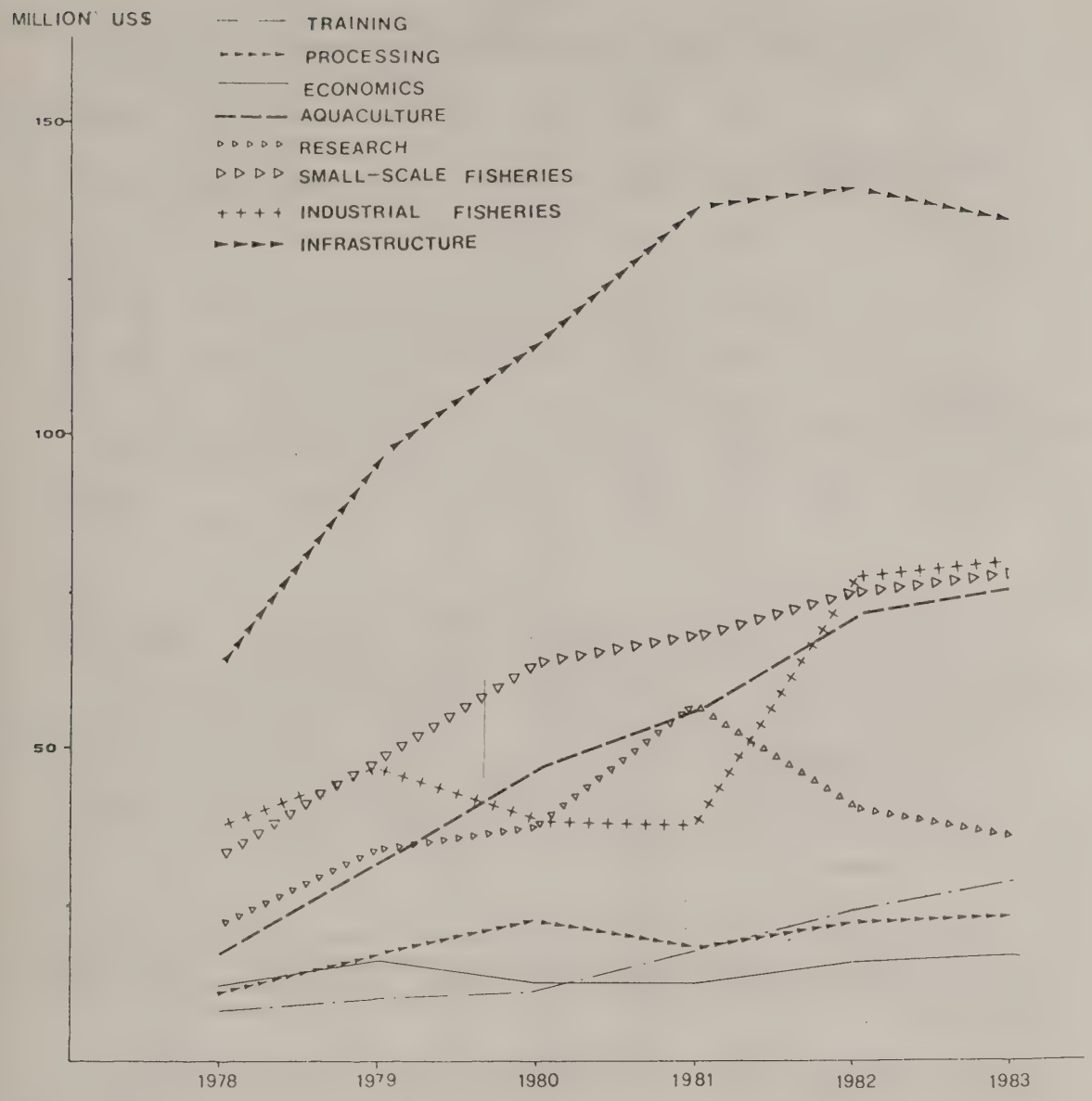

Fig. 2 Distribution of aid by type of assistance

Table 8

Aid Allocation by Groups of Subjects (US$'000)

	1978	1979	1980	1981	1982	1983	1984[a/]
I. Research (including research vessels)	21 478	33 855	37 689	57 248	41 098	36 074	29 003
II. Small-scale fisheries	32 570	48 934	63 043	67 525	75 353	78 794	68 253
III. Industrial fisheries	37 630	46 483	38 098	38 217	76 100	79 612	80 825
IV. Vessels and infrastructure	64 026	96 002	115 176	136 892	139 376	135 331	101 181
V. Processing and marketing	10 819	16 677	22 149	18 416	22 461	23 561	17 702
VI. Aquaculture	16 792	31 607	47 193	56 278	71 262	75 324	69 511
VII. Economics/Planning	11 147	15 504	17 498	12 408	16 251	17 359	12 685
VIII. Training	7 018	9 936	10 778	16 010	24 189	29 121	24 303

In the early 1970s, fisheries development projects concentrated on the production side, mainly through provision of large vessels and fishing harbours. Evaluation of fish resources and provision of research vessels was another policy of these years. After only limited success of these projects, interest was directed towards small-scale fisheries. However, also in this sector, only the production side was assisted. Motorization and boatbuilding projects for the small-scale fisheries characterized the mid-70s. Evaluation shows that this approach, too, was not very successful. In recent years "integrated small-scale fisheries projects", including also the processing and distribution sector, have been launched. Examples of this type of fisheries project are the "Integrated Small-Scale Fisheries Project in West Africa", the "Bay of Bengal Programme", both FAO/Trust Fund projects, and the "Zanzibar Development Project" funded by the German Development Bank "KfW".

Aid for vessels, ports and associated infrastructure accounted for about 30 percent of total external assistance in 1983. Ports construction accounts for about 60 percent of this group and the supply of fishing vessels (excluding research vessels) built by developed countries for a further 34 percent. These projects are mostly bilateral capital aid activities; however, their share of the total has decreased in recent years.

More emphasis was given to artisanal fisheries in the period under survey. Industrial fisheries, however, is receiving about 17 percent of total assistance.

The data demonstrate the very sharp emphasis accorded to the aquaculture sector, funds for which more than trebled from 1978 to 1981, to become the fourth major recipient group with about 15 percent of the total.

The allocations of aid for fisheries research is decreasing. It accounted for 15 percent of total aid in 1981 and only 8 percent in 1983. It includes the cost of research vessels provided under fisheries assistance programmes.

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a/ Preliminary

Processing and marketing is likely to be under-estimated since it is often an unquantifiable part of small-scale or industrial fisheries projects, and projects which deal exclusively with this aspect of the fishing industry are very few. Although still relatively small, the increasing amount of aid for training projects is an encouraging trend.

Tables 9 and 10 show the distribution of aid to the various types of projects by aid components (technical or capital aid), and by type of donors (multilateral and bilateral), in 1978, 1981, 1982 and 1983.

Table 9

Assistance to different types of fisheries projects by aid components (US$'000)

	1978		1981		1982		1983	
	Technical	Capital	Technical	Capital	Technical	Capital	Technical	Capital
I. Research	22 220	1 176	15 657	41 612	19 712	21 061	16 188	19 600
Pollution control	82	0	339	0	325	0	286	0
II. Small-scale fish.	5 294	15 922	14 545	23 401	17 973	39 623	18 181	47 352
Cooperatives	1 192	2 370	615	1 497	587	1 747	203	250
Credit	0	5 071	0	19 448	0	5 515	340	5 515
Motorization	589	2 132	175	7 845	75	9 833	0	6 953
III. Industrial fish.	3 667	33 963	1 655	36 562	3 834	72 266	5 124	74 488
IV. Ports	1 186	27 012	1 530	60 456	123	86 087	110	79 762
Vessels	552	27 260	475	60 411	456	39 166	300	46 717
Repair yards	0	0	0	3,000	0	3 100	0	100
Boatbuilding	5 298	1 500	4 005	2 522	41	1 400	36	500
Equipment	1 165	53	935	3 558	97	8 906	77	7 729
V. Marketing	2 219	0	3 222	1 030	2 788	3 640	2 766	2 576
Processing	1 004	0	1 232	3 026	1 832	2 095	1 554	5 585
Ice plants	979	617	0	9 684	1 140	10 951	1 240	9 840
Nutrition	0	0	222	0	15	0	0	0
VI. Aquaculture	9 403	7 389	23 131	33 147	29 303	41 959	27 908	47 416
VII. Economics/ Planning	4 420	0	7 339	0	8 910	0	8 781	0
Monitoring and Surveillance	0	5 396	190	3 000	330	3 000	290	3 000
EEZ	80	0	1 329	0	2 043	3 575	1 100	3 575
Feasibility stud.	1 251	0	550	0	1 393	0	513	100
VIII. Training	6 718	300	8 497	7 513	8 659	15 530	8 771	20 350

Table 9 needs little commentary. The data throws light on the, by definition, inevitably heavy capital aid provided for investment in ports, vessels (for both fishing and research) and industrial fisheries, aquaculture installations and small-scale fisheries motorization programmes. The capital aid component in the Monitoring and Surveillance projects reflects the provision of hardware such as surveillance vessels and air planes.

Table 10

Total assistance to different types of fisheries projects by type of donor (US$'000)

	1978		1981		1982		1983	
	Multilat.	Bilat.	Multilat.	Bilat.	Multilat.	Bilat.	Multilat.	Bilat.
I. Research	6 318	15 078	17 477	39 792	9 556	31 217	8 578	27 210
Pollution control	0	82	256	83	39	286	0	286
II. Small-scale fish.	17 276	3 940	24 257	13 689	38 531	19 065	46 388	19 145
Cooperatives	3 550	12	1 994	118	2 119	215	250	203
Credit	5 071	0	19 448	0	4 390	1 125	4 730	1 125
Motorization	1 989	732	4 175	3 845	6 795	3 113	5 920	1 033
III. Industrial fish.	15 557	22 073	26 128	12 089	41 712	34 388	48 134	31 478
IV. Ports	12 451	15 747	33 816	28 170	42 346	43 864	47 367	32 505
Vessels	2 375	25 437	20 656	40 230	12 212	27 410	10 671	36 346
Repair yards	0	0	3 000	0	3 000	100	0	100
Boatbuilding	657	6 141	1 427	5 100	41	1 400	36	500
Equipment	0	1 218	0	4 493	0	9 003	0	7 806
V. Marketing	307	1 735	910	3 342	1 072	5 356	1 010	4 332
Processing	508	496	4 092	166	1 325	2 602	1 198	5 941
Ice plants	349	7 247	109	9 575	1 249	10 842	1 240	9 840
Nutrition	0	0	222	0	15	0	0	0
VI. Aquaculture	11 891	4 901	38 553	17 725	49 182	22 080	55 765	19 559
VII. Economics/Planning	3 854	566	6 055	1 284	6 509	2 401	6 412	2 369
Monitoring and Surveillance	0	5 396	190	3 000	290	3 040	250	3 040
EEZ	80	0	1 329	0	2 043	3 575	1 100	3 575
Feasibility studies	1 147	104	0	550	606	787	83	530
VIII. Training	3 502	3 516	3 931	12 079	10 656	13 533	14 014	15 107

Table 10 shows that multilateral aid in the period under survey concentrates on small-scale fisheries, aquaculture and industrial fisheries, while bilateral aid gave particular emphasis to the supply of vessels, both for industrial fisheries and for research activities. These vessels are generally built in the donor countries, benefitting thus the boatbuilding industry of those countries.

3. ANALYSIS OF AID BY DONORS

General

Donor agencies have been divided into ten groups: (i) the World Bank group with its affiliates IBRD, IDA and IFC; (ii) the Regional Development Bank group, i.e., the Asian Development Bank (ADB), the African Development Bank (AfDB), the West African Development Bank (BOAD), and the Inter-American Development Bank (IDB); (iii) other multilateral aid of which IFAD accounts for more than 90 percent; (iv) the UN system comprising the United Nations Development Programme (UNDP), the United Nations Capital Development Fund (UNCDF), the United Nations Interim Fund for Scientific and Technological Development (UNIFSTD), the United Nations Voluntary Fund for the Decade of Women (UNV), the Freedom from Hunger Campaign (FFHC), and FAO's Money and Medal Programme (MMP), and its Technical Cooperation Programme (TCP) (the executing agencies are FAO, UNICEF, UNESCO and UNIDO); (v) bilateral Trust Fund projects executed by FAO; (vi) non-governmental organizations, mostly churches or political groups; (vii) EEC; (viii) OPEC; (ix) "TCDC" projects, i.e., aid from one developing country to another developing country; (x) direct "bilateral" aid from developed countries to developing countries.

Table 11

Total Aid to the Fisheries Sector by Donor Groups (US$'000)

	1978	1979	1980	1981	1982	1983	1984 a/
World Bank	21 333	29 874	44 399	49 119	66 171	69 445	65 234
Regional Development Banks	28 445	49 928	67 401	84 342	108 556	116 977	115 503
Other Multi-lateral (mainly IFAD)	1 249	1 339	2 092	2 064	5 117	11 623	12 518
UN System	19 201	23 828	26 960	24 747	22 017	20 367	14 083
Trust Funds-FAO	4 244	9 593	9 163	10 360	11 049	11 715	10 641
Non-Governmental Organizations	1 101	2 237	1 855	845	860	495	0
EEC	2 001	5 463	8 435	15 647	12 697	15 518	21 765
OPEC	9 047	10 180	21 970	17 358	20 502	18 951	17 776
TCDC	438	438	143	3 743	6 956	6 906	6 096
Bilateral Donors	114 421	166 189	169 206	195 330	214 900	203 079	139 747
Total:	201 480	299 069	351 624	403 555	468 825	475 076	403 363

a/ Preliminary

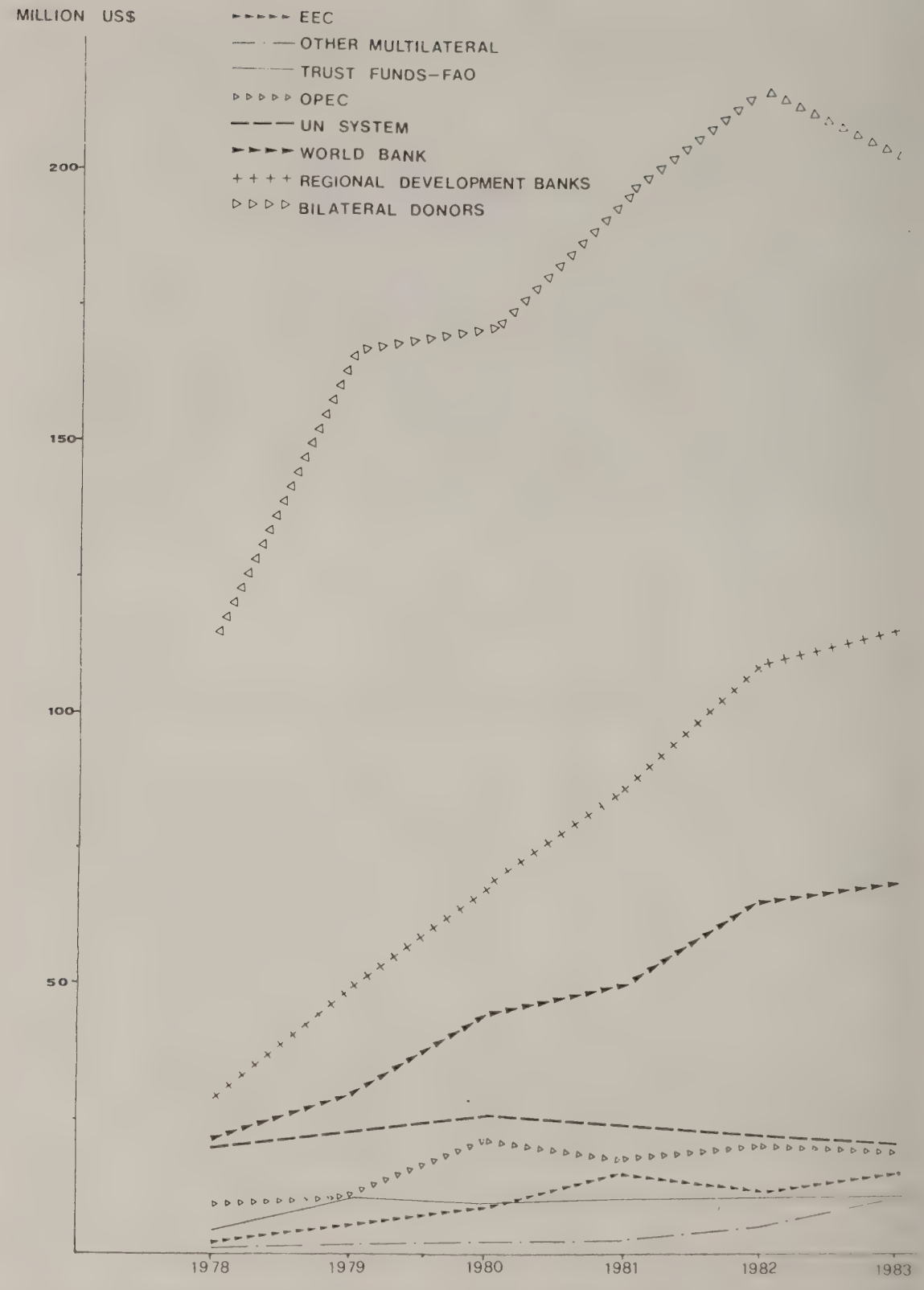

Fig. 3 Fisheries aid by donor agencies

Almost half of the external assistance is coming from bilateral sources. Regional Development Banks are the next and increasingly important source of aid, while the World Bank is contributing about 15 percent of fisheries aid. EEC and OPEC have substantially increased their support to the fisheries sector. The rôle of trust funds channelled through FAO is becoming more and more important while, in relative terms, aid from the UN system has declined.

Multilateral Agencies

WORLD BANK

Table 12

World Bank's Assistance by Region (US$'000)

	1978	1979	1980	1981	1982	1983	1984 a/
Africa	4 748	4 748	4 414	3 214	3 864	3 066	3 716
Asia	11 710	13 510	25 819	24 939	37 571	40 498	36 057
Latin America	1 500	3 820	3 820	3 820	7 910	8 050	7 630
Near East	3 375	6 276	8 826	15 626	15 306	16 311	16 311
Oceania	0	1 520	1 520	1 520	1 520	1 520	1 520
Total:	21 333	29 874	44 399	49 119	66 171	69 445	65 234

The World Bank concentrates its activities in the Asian region, especially the Philippines and India. The Bank's assistance to the Near East region, mainly Egypt and Yemen Arab Republic, has risen from 16 percent of the total in 1978 to 23 percent in 1983.

The area of emphasis by the World Bank has changed in recent years from capital-intensive projects, such as some big fishing harbour projects of the early 1970s, to more labour-intensive projects which assist artisanal fishermen or fish-farmers.

Table 13

World Bank's assistance by type of project (US$'000)

	1978	1979	1980	1981	1982	1983	1984 a/
Research	0	0	7 600	7 600	7 600	7 600	7 600
Small-scale fish.	6 271	4 571	4 000	2 800	6 180	6 560	6 560
Industrial fish.	1 500	5 340	5 340	5 340	11 890	12 240	11 820
Vessels and infrastructure	10 874	14 945	18 705	22 705	21 865	18 712	15 171
Processing and Marketing	0	0	0	0	0	120	120
Aquaculture	2 688	4 168	8 754	10 674	16 432	20 477	20 377
Economics/Planning	0	850	0	0	0	0	0
Training	0	0	0	0	0	1 880	1 880
Total:	21 333	29 874	44 399	49 119	63 967	67 589	63 528

a/ preliminary

Ports and other capital-intensive projects accounted for about 50 percent of the World Bank's total aid in 1981, but their share has decreased to 27 percent in 1983. In the period under review, the aquaculture sector, most of which is at the small-scale level, has received a four-fold increase in aid and is now the biggest object of expenditure of the World Bank's fisheries aid, representing about 30 percent of World Bank aid. Often these fish-farming projects are a part of Integrated Rural Development Projects.

The World Bank started in 1980 a US$ 38 million project in the Philippines to assist fisheries research at the Philippines Fisheries Colleges for five years.

ASIAN DEVELOPMENT BANK

Like the World Bank, the ADB has recently changed the emphasis of its fisheries aid. While in the early 1970s its projects focused on marine fishing vessels and shore-based facilities, there has recently been a notable switch to inland and aquaculture activities, and from export-oriented to local food supply and labour-intensive projects. The average size of ADB loans grew from US$ 5.9 million in 1969-73 to about US$ 15.0 million in 1974-78, covering about a half of the total cost of each project.

Table 14

Asian Development Bank's Assistance to the Fisheries Sector by type of projects (US$'000)

	1978	1979	1980	1981	1982	1983	1984[a/]
Research	0	0	0	0	0	0	0
Small-scale fish.	8 500	16 150	12 150	12 150	10 790	17 590	15 340
Industrial fish.	3 300	3 333	3 333	3 333	5 716	5 716	7 896
Vessels and infrastructure	600	4 563	4 400	15 900	13 200	19 600	15 800
Processing and Marketing	0	0	0	0	80	40	40
Aquaculture	3 122	8 640	13 640	16 005	13 613	13 486	19 636
Economics/ Planning	40	144	0	0	115	115	0
Training	0	0	0	0	0	0	0
Total:	15 562	32 830	33 523	47 388	43 514	56 547	58 712

The small-scale fisheries sector has received a substantial increase in its share of total ADB assistance, accounting for about one-third of total aid. Aquaculture activities are also becoming dominant. This trend will continue in the future as some aquaculture projects are still in the ADB pipeline.

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a/ Preliminary

AFRICAN DEVELOPMENT BANK

Assistance to the fisheries sector by the African Development Bank is still limited, amounting to about US$ 20 million during the period 1978 to 1983. However, the Bank's present policy is aiming at providing more assistance to the fisheries sector; in fact, the Bank is considering a number of pipeline projects in various African countries. At present, the African Development Bank is providing assistance to an Artisanal Fisheries Project in the Comoros Islands (US$ 5.29 million) and an Industrial Fisheries Project in The Gambia (US$ 12 million, cofinanced by Norway and Denmark).

INTER-AMERICAN DEVELOPMENT BANK

There has been increasing support to the industrial fisheries by the Inter-American Development Bank during the last few years, while small-scale fisheries remain the major recipient of IDB assistance. A major objective of the IDB is to increase the availability of food fish for the local population. Many projects include a component of product development in order to increase the utilization of fish for human consumption.

Table 15

Inter-American Development Bank's Assistance to the Fisheries Sector by type of projects (US$'000)

	1978	1979	1980	1981	1982	1983	1984 a/
Research	0	0	0	0	2 570	2 400	2 000
Small-scale fish.	5 854	6 069	20 014	20 092	20 060	14 574	14 205
Industrial fish.	5 375	5 375	5 527	11 304	16 150	15 777	15 777
Vessels and infrastructure	0	0	414	414	16 414	16 414	16 414
Processing and Marketing	0	0	0	0	0	0	0
Aquaculture	133	133	2 333	2 333	4 800	5 300	3 150
Economics/Planning	521	521	479	0	83	0	0
Training	0	0	0	0	0	0	0
Total:	11 883	12 098	28 767	34 143	60 077	54 465	51 546

The substantial increase in IDB aid to the fisheries sector in 1983 is due to the approval of fisheries projects in Peru (two), Panama, Chile, Uruguay and Nicaragua. These loans amounted to US$ 66.5 million, raising the total IDB fisheries commitments to US$ 361.5 million. The fisheries projects financed by the IDB involve the purchase of more than 2 200 new fishing boats, with the prospect of increased fish landings of 2.5 million tons. The IDB is at present the second major donor to the fisheries sector, after Japan, even more important than the ADB.

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a/ Preliminary

Other Multilateral Agencies

IFAD

IFAD, concentrating on small-scale fisheries projects, has substantially increased its inputs into the fisheries sector. While during the period 1978 to 1981 IFAD's assistance amounted on average to about US$ 2 million per year, this average has now reached about US$ 6 million. Only five operational IFAD projects are exclusively fisheries projects (Djibouti US$ 2 million; Grenada US$ 1.5 million; PDRY US$ 5 million; Maldives US$ 2 million and Congo US$ 4.6 million). However, the number of IFAD projects with a fisheries component is steadily increasing. The regional distribution shows that Africa is at present the major recipient of IFAD fisheries aid, followed by Oceania and the Caribbean.

UN SYSTEM AND TRUST FUND PROJECTS

In the period under review, multilateral assistance to the individual country's fisheries sector channelled through the UN system amounted to an average US$ 20 million per year, of which about 80 percent represents UNDP funded projects. From a peak of US$ 23 million in 1979, such assistance is clearly on a decreasing trend, many donor countries preferring to allocate aid resources,in most cases made scarcer by unfavourable economic situations, through bilateral rather than UN executed multilateral programmes.

Table 16

UN System and Trust Fund Projects Fisheries Sector by region (US$'000)

	1978	1979	1980	1981	1982	1983	1984[a/]
Africa	7 617	10 032	9 722	8 455	8 746	8 780	6 849
Asia	4 423	5 710	6 803	7 908	7 783	7 165	4 704
Latin America	2 229	2 717	2 263	1 668	1 163	456	208
Near East	837	2 378	1 511	910	1 182	1 238	991
Oceania	601	1 237	823	746	822	709	407
Caribbean	1 052	988	831	825	549	804	354
Total:	16 759	23 062	21 953	20 512	20 245	19 152	13 513
Global, interregional and regional projects	8 671	6 738	6 927	15 178	12 821	12 930	11 211
Grand total:	25 430	29 800	28 880	35 690	33 066	32 082	24 724

Asia and Africa, again, are the major recipients regional-wise,while the research sector receives the greatest allocation. Increasing attention is being given to small-scale fisheries and to aquaculture (Table 17).

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a/ preliminary

Table 17

UN System and Trust Fund Projects Fisheries Sector by type of activity (US$'000)

	1978	1979	1980	1981	1982	1983	1984[a/]
Research	7 239	6 450	5 687	8 758	6 827	5 461	4 651
Small-scale fish.	2 470	4 872	3 682	6 596	5 268	6 529	6 276
Industrial fish.	1 532	2 365	1 845	590	1 272	1 512	1 250
Vessels and infrastructure	57	160	283	305	120	36	0
Processing and Marketing	1 228	2 927	2 986	2 557	3 116	2 677	2 140
Aquaculture	4 187	5 073	6 551	6 111	5 672	5 600	3 947
Economics/ Planning	5 697	4 949	4 331	7 884	8 192	7 190	4 126
Training	3 020	3 004	3 515	2 889	2 599	3 077	2 334
Total:	25 430	29 800	28 880	35 690	33 066	32 082	24 724

EEC

The regional distribution of EEC aid is influenced by the EEC policy to direct its assistance mainly to developing countries in Africa, the Caribbean and Oceania. However, the traditional fishing areas of member countries in West Africa is receiving relatively more EEC aid than the other ACP countries.

Table 18

EEC Projects Total Assistance to the Fisheries Sector by region (US$'000)

	1978	1979	1980	1981	1982	1983	1984
Africa	1 448	3 798	6 307	7 807	7 085	9 852	14 812
Asia	0	552	952	3 352	2 615	2 976	3 078
Latin America	287	462	399	399	385	220	870
Near East	0	0	0	600	960	960	760
Oceania	157	497	273	2 023	1 208	908	1 643
Caribbean	109	109	109	421	444	602	602
Total:	2 001	5 418	8 040	14 602	12 697	15 518	21 765

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a/ preliminary

Table 19

EEC Assistance to the Fisheries Sector
by type of activity (US$'000)

	1978	1979	1980	1981	1982	1983	1984[a/]
Research	0	0	0	0	1 467	1 210	2 180
Small-scale fish.	224	224	1 824	3 324	2 459	2 459	4 234
Industrial fish.	0	0	0	0	821	4 626	5 616
Vessels and infrastructure	0	1 640	2 022	7 084	4 500	3 312	3 312
Processing and Marketing	109	284	284	284	414	600	4 550
Aquaculture	1 126	1 545	2 698	2 698	2 001	2 754	1 636
Economics/ Planning	63	613	0	0	578	100	0
Training	479	1 112	1 212	1 212	457	457	237
Total:	2001	5 418	8 040	14 602	12 697	15 518	21 765

In 1983 EEC fisheries assistance was centred upon fishing ports construction and industrial fisheries projects, accounting for almost 50 percent of the total. There has been a sharp increase in the EEC support to the small-scale fisheries sector between 1978 and 1983. The major projects in this category are small-scale fisheries projects in Gambia (US$ 3.0 million), Guinea-Bissau (US$ 1.9 million), Gabon (US$ 1.8 million) and an artisanal boat-building project in Equatorial Guinea (US$ 1.045 million). Pipeline EEC projects indicate further emphasis upon the artisanal fisheries sector, especially in Africa.

OPEC

OPEC has naturally tended to concentrate its aid in the Near-East region which in 1981 accounted for 60 percent of the total. However, this share decreased to 35 percent in 1983. Notable projects are a US$ 14.0 million industrial fisheries project in Tunisia, in collaboration with the Arab Fund for Economic and Social Development, and a US$ 16.2 million project to build a fishing port in Yemen People's Democratic Republic, in conjunction with the Abu Dhabi Fund. In 1983 BADEA and the Kuwait Fund approved a loan to Angola for the purchase of ten fishing vessels and the rehabilitation of processing facilities. The total amount of the loan is US$ 22 million. This project accounts for the increase in OPEC aid to Africa in 1983.

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a/ preliminary

Table 20

OPEC Assistance to the Fisheries Sector by Region (US$'000)

	1978	1979	1980	1981	1982	1983	1984[a/]
Africa	2 700	2 708	2 107	1 907	2 209	8 510	8 460
Asia	1 400	2 525	15 431	4 991	8 471	3 791	2 666
Latin America	0	0	0	0	0	0	0
Near East	4 302	4 302	4 432	10 460	9 822	6 650	6 650
Oceania	0	0	0	0	0	0	0
Caribbean	645	645	0	0	0	0	0
Total:	9 047	10 180	21 970	17 358	20 502	18 951	17 776

OPEC has concentrated its aid in building ports and providing equipment and in the development of industrial fisheries. The sharp increase of research activities in 1983-84 is due to the installation of the Regional Institute of Fisheries Science at Nouadhibou, cofinanced by the Islamic Development Bank and the OPEC Fund (total US$ 8 million).

Table 21

OPEC Assistance to the Fisheries Sector by type of project (US$'000)

	1978	1979	1980	1981	1982	1983	1984[a/]
Research	0	8	8	8	10	1 910	1 910
Small-scale fish.	2 245	3 370	2 725	2 525	2 525	1 125	0
Industrial fish.	3 850	3 850	5 516	5 516	9 696	2 666	2 666
Vessels and infrastructure	2 952	2 952	13 591	9 179	7 741	13 020	13 070
Processing and Marketing	0	0	0	0	0	0	0
Aquaculture	0	0	0	0	0	0	0
Economics/ Planning	0	0	0	0	400	100	0
Training	0	0	130	130	130	130	130
Total:	9 047	10 180	21 970	17 358	20 502	18 951	17 776

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a/ preliminary

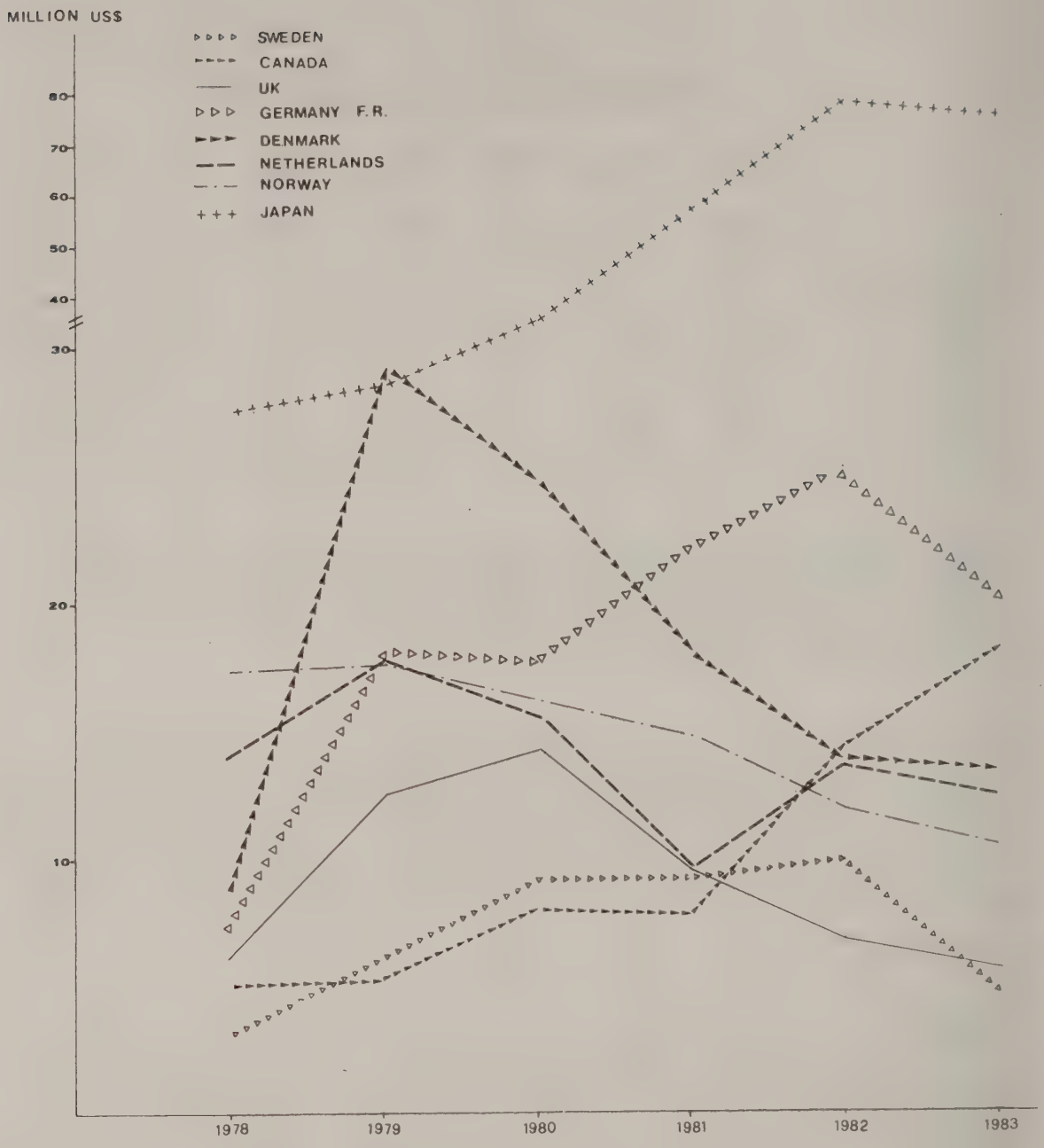

Fig. 4 Bilateral donor agencies

Bilateral Donor Agencies

The figures shown in this section are only partially official and should be taken as indications of magnitude of bilateral assistance to the fisheries and not as absolute figures.

In the period under review and in aggregate, bilateral donors have shown an increasing interest in Africa (at present 45 percent), while Asia is receiving less bilateral aid (35 percent).

Activity-wise, fishing ports construction and supply of fishing and research vessels have taken up 40 percent of the bilateral funds (see Table 23).

Table 22

Bilateral Assistance to the Fisheries Sector (US$'000)

	1978	1979	1980	1981	1982	1983	1984[a/]
Africa	32 715	46 513	51 656	71 314	90 248	90 787	54 072
Asia	64 873	90 015	87 987	85 971	75 890	62 379	44 002
Latin America	11 595	20 738	20 010	17 826	24 756	24 271	16 323
Near East	2 533	3 121	3 766	12 294	13 919	15 377	18 682
Oceania	1 761	3 731	3 907	3 883	7 784	7 307	4 156
Caribbean	944	2 071	1 880	4 042	2 303	2 958	2 512
Total:	114 421	166 189	169 206	195 330	214 900	203 079	139 747

Table 23

Bilateral Assistance to the Fisheries Sector
by type of project (US$'000)

	1978	1979	1980	1981	1982	1983	1984[a/]
Research	15 160	25 578	22 064	39 725	29 963	24 046	15 735
Small-scale fish.	4 684	8 460	12 738	18 152	25 685	24 557	16 964
Industrial fish.	22 073	26 175	16 492	12 089	24 692	28 812	27 207
Vessels and infrastructure	48 543	69 276	73 261	77 993	74 811	65 017	37 414
Processing and Marketing	9 478	13 491	18 165	13 083	19 000	20 313	10 902
Aquaculture	4 901	10 655	10 980	17 225	15 113	13 103	9 024
Economics/ Planning	6 066	6 737	9 498	4 834	9 233	9 254	8 379
Training	3 516	5 817	6 008	12 229	16 403	17 977	14 122
Total:	114 421	166 189	169 206	195 330	214 900	203 079	139 747

a/ preliminary

Japan has consistently been the major bilateral donor of assistance to fisheries. Denmark, Norway, the Netherlands and, increasingly, the Federal Republic of Germany have also been particularly notable bilateral supporters of developing countries' fisheries. There has recently been a marked increase in bilateral assistance to fisheries by the USA and Italy.

A further review of bilateral aid by individual donor countries follows.

JAPAN

Assistance by Japan, the major bilateral donor to the fisheries sector, has steadily increased over a period when more and more developing countries have extended jurisdiction over marine areas where Japanese vessels have traditionally fished. More than 90 percent of Japanese bilateral fisheries aid goes to coastal countries, and in many cases this aid has been part of a package for fishing rights. In general, Japanese fisheries aid projects are well integrated. When the supply of equipment is part of the project, a training programme is normally jointly executed to teach the correct use of the equipment. Similarly, Japanese motorization projects are usually accompanied by the supply of spare parts and repair training.

Table 24

Japanese Bilateral Fisheries Aid by region (US$'000)

	1978	1979	1980	1981	1982	1983	1984[a/]
Africa	743	3 967	4 487	8 169	14 603	14 279	4 999
Asia	23 033	20 834	22 989	45 922	40 828	34 860	20 730
Latin America	3 444	3 331	5 779	5 513	11 602	14 495	7 690
Near East	0	0	480	480	3 110	5 224	3 784
Oceania	300	550	1 582	2 600	6 167	6 160	3 560
Total:	27 520	28 689	35 317	62 684	76 310	75 018	40 763

Asia has always been the main recipient of Japanese aid. Japanese fisheries aid to the Africa region rose markedly during the survey period when Japan started financing projects in Madagascar, Mauritius and Somalia, each amounting to US$ 2.0 million. The Pacific Islands are also receiving more assistance from Japan, perhaps reflecting the interest of the country in tuna fisheries. Projects in the Pacific Islands also amount to US$ 2 million each for fisheries equipment and training. In Latin America, Japanese aid is concentrated on: a fishing port building project in Guyana, fishing vessel supply to Colombia, fisheries training projects in Brazil and Mexico, the supply of a research vessel to Argentina and fisheries equipment to Ecuador.

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a/ Preliminary

Table 25

Japanese Bilateral Fisheries Aid by Type of Project (US$'000)

	1978	1979	1980	1981	1982	1983	1984 a/
Research	4 214	3 381	2 895	26 376	12 406	14 350	9 500
Small-scale fish.	765	865	3 125	6 391	9 318	10 366	5 150
Industrial fish.	11 075	11 075	0	0	1 910	4 190	3 490
Vessels and infrastructure	9 581	9 945	24 840	24 044	38 615	30 957	12 193
Processing and Marketing	0	150	0	1 030	1 830	3 140	3 140
Aquaculture	81	1 025	1 477	2 164	3 514	2 445	1 350
Economics/ Planning	196	216	437	149	187	0	0
Training	1 608	2 032	2 759	2 530	8 530	9 570	5 940
Total:	27 520	28 689	35 317	62 684	76 310	75 018	40 763

The largest part of Japanese aid was related to the supply of research and other fishing vessels. Assistance to the small-scale fisheries sector and training activities show an increasing trend.

As the annual average amount for fisheries development coming from other bilateral sources other than Japan is rather limited, no tables are given for the following countries.

GERMANY, F.R.

During the period 1974-83 the Federal Republic of Germany invested about US$ 155.0 million in fisheries projects, of which two-thirds was in the form of capital aid. The annual average of German aid to fisheries is about US$ 17.0 million, of which 40 percent is for infrastructure and fishing vessel supply projects.

German support for the Latin American fishing industry remained strong through the years under survey (about one-third). Aid to Africa has been steadily increasing, reaching 40 percent of total German fisheries assistance.

DENMARK

Denmark has traditionally given consistent support to the development of the fisheries sector of Third World countries; it also finances trust fund fisheries projects executed by FAO. At the direct country-to-country level, Denmark has concentrated its aid on Asia (75 percent of total). The annual average of Danish bilateral aid to the fisheries sector is US$ 13.0 million.

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a/

The most important Danish fisheries projects in Asia are a vessel supply project in Burma (US$ 29.9 million), a research and other vessel supply project in India (US$ 15.0 million), and several fisheries projects in Bangladesh (US$ 15.5 million). Most Danish projects relate to the provision of equipment, normally by way of soft loans.

NORWAY

Norwegian policy in assistance to the development of the fisheries sector in Third World countries has been very similar to that of Denmark; direct bilateral aid by Norway has also concentrated on Asia (67 percent), in particular through the provision of fishing vessels to India, Burma and Bangladesh. Norway is also a traditionally strong supporter of fisheries development via FAO - executed Trust Fund projects. Norwegian assistance to Viet Nam came to an end in 1982; assistance was then given to a fisheries training project in Tanzania. The average amount of Norwegian aid to fisheries is US$ 15.0 million per year.

USA

The US bilateral aid to the fisheries sector has increased rapidly during the past four years but remains relatively small (about US$ 10.0 million per year) compared to other activities of the United States. The most important US project in fisheries is the aquaculture project in Egypt (US$ 24.0 million) which started in 1981. USAID aquaculture projects are also operating in Rwanda, Kenya, Lesotho, Central African Republic and Zaire.

ITALY

Italian bilateral aid to the fisheries sector did not exceed US$ 300/400 000 per year until 1981 when the supply of fishing vessels to Somalia represented some US$ 10.6 million per year. At present, Italy is assisting the industrial fisheries of Somalia, Angola and Senegal, and providing equipment to small-scale fisheries in Gabon and Mozambique. The Italian involvement in fisheries development is likely to continue in the future, especially in those countries where the Italian fleet has traditional fishing grounds.

SPAIN

Spain's assistance to the fisheries sector of developing countries is, similarly to Italy, concentrated entirely on Africa. Industrial fisheries projects are assisted in Senegal, Mauritania and Angola.

UNITED KINGDOM

The United Kingdom directs its assistance mainly to members of the British Commonwealth. UK aid to Asia, in particular, reflects capital-intensive projects in Burma accounting for a total of US$ 24.61 million.

British fisheries aid to Africa was concentrated on the land-locked South African countries such as Botswana, Lesotho and Swaziland, where aquaculture projects were assisted, Tanzania (small-scale fisheries), Seychelles (tuna fishing industry) and Malawi (administrative advice). UK aid to the fisheries sector is rather widely distributed and embraces fishing harbour construction in India, cold-storage facilities in Burma as well as technical assistance projects.

NETHERLANDS

Netherlands aid to the fisheries sector is mainly concentrated on Asia (66 percent) and Africa (31 percent) for an annual average of US$ 10.0 million, after a peak of about US$ 18.0 million in 1979.

This decrease of aid to the fisheries sector is due to a change in Dutch assistance policy from large-scale fishing vessel projects to small-scale fisheries projects. Dutch aid to the fish processing and marketing sector consists mainly of the provision of ice plants and other equipment. About 70 percent of Dutch aid is in the form of provision of infrastructure, while the aquaculture sector is the second major recipient of assistance which is mostly concentrated in Lao on several fish culture projects for a total of US$ 3.5 million.

SWEDEN

Swedish aid has been concentrating on Africa, and especially on Angola (training, small-scale fisheries and research), Mozambique (boat-building), Somalia (boat-building) and Guinea Bissau (small-scale fisheries). Some assistance goes to the marketing sector in Sri Lanka and to integrated marine/estuarine fisheries development in India. The annual average of Swedish aid to the fisheries sector is about US$ 9.0 million, excluding the Swedish Trust Fund projects in the Bay of Bengal and in Mozambique.

CANADA

Canada also has given emphasis in its fisheries aid to West Africa (75 percent of total) where it supported the motorization of artisanal fishing boats and fish marketing projects, especially in Senegal and the Cameroon, and the provision of monitoring and surveillance airplanes to Senegal. Latin America also receives some attention by Canada (about 20 percent); examples are the fisheries research projects in Brazil (US$ 3.0 million) and Peru (US$ 1.0 million), and small-scale fisheries projects in Colombia (US$ 7.0 million). Canadian assistance to fisheries increased during the period from 1981 to 1983, mainly due to projects in Senegal (US$ 7.3 million) aiming at modernizing the inshore fisheries through the introduction of more efficient fishing and fish processing techniques.

FRANCE

France's aid policy provides for particular assistance to ex-colonies, especially in Africa (90 percent) where there has been emphasis on industrialization projects in Cameroon, Ivory Coast, Senegal and Madagascar. In Latin America, France is funding inland fisheries development projects in Bolivia (US$ 0.75 million) and in Brazil (US$ 0.58 million). The annual average of French assistance is about US$ 9.0 million.

4. ANALYSIS OF FISHERIES ASSISTANCE PROJECTS BY TYPE OF COUNTRY

A. LDC Countries

Thirty-six countries of the world are defined as Least Developed Countries (LDC). The majority of these, 24, are African countries. The general development policy of bilateral and multilateral donors is to assist these countries. The following tables exclude interregional and regional projects as it is impossible to identify their allocation by type of country.

Table 26

Assistance to the fisheries sector of LDC and Non-LDC countries (US$'000)

	LDC	Non-LDC
1978	31 873	161 757
1979	55 970	230 291
1980	72 953	261 954
1981	84 731	300 703
1982	88 390	363 836
1983	73 791	383 965
1984[a/]	51 815	337 547

Table 26 shows that the LDC countries account for about 20 percent of total aid, while their population has a share of 12 percent of total population of the developing countries (excluding China). Thus the fisheries aid going to these countries is slightly higher than their population share.

Figure 5 identifies the distribution of assistance to LDC and Non-LDC countries by the role of the fishing industry in these countries. The criteria for identifying the relative importance of the fishing industry were: employment, contribution to GDP and food supply, importance of fisheries for foreign exchange earnings.

While aid to Non-LDC countries reflects the importance of the fishing industry in these countries, assistance to LDC countries is almost equally distributed between countries with an important fishing industry and those where fisheries is not important.

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a/ Preliminary

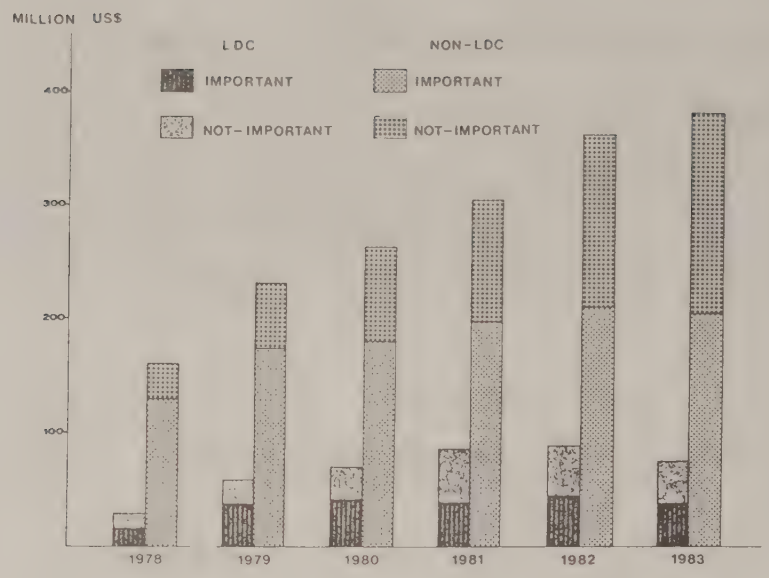

Fig. 5 Fisheries assistance by type of country (LDC) and importance of the fishing industry

B. MSA Countries

Forty-four countries are defined as Most Seriously Affected Countries (by the increase of oil prices). As the increase of fuel costs influences very much the cost of motorized fisheries, especially in the developing world, an analysis of aid going to MSA and Non-MSA countries can be useful.

Table 27

Assistance to the fisheries sector of MSA and Non-MSA countries (US$'000)

	MSA	Non-MSA
1978	103 498	90 132
1979	153 398	132 863
1980	171 970	162 937
1981	201 813	195 621
1982	201 719	250 507
1983	204 047	253 709
1984[a/]	164 103	225 259

a/ preliminary

Development aid going to the fisheries sector is almost equally distributed between MSA and Non-MSA countries, while the population of the MSA countries accounts for about two-thirds of the total population of the Third World countries (excluding China). These figures show that relatively more aid goes to the fishing industry of Non-MSA countries.

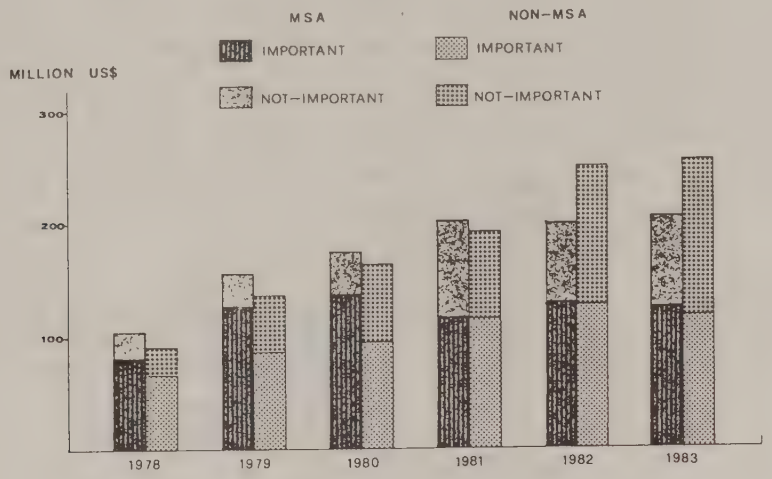

Fig. 6 Fisheries assistance by type of country (MSA) and importance of the fishing industry

C. Income Level Of Countries

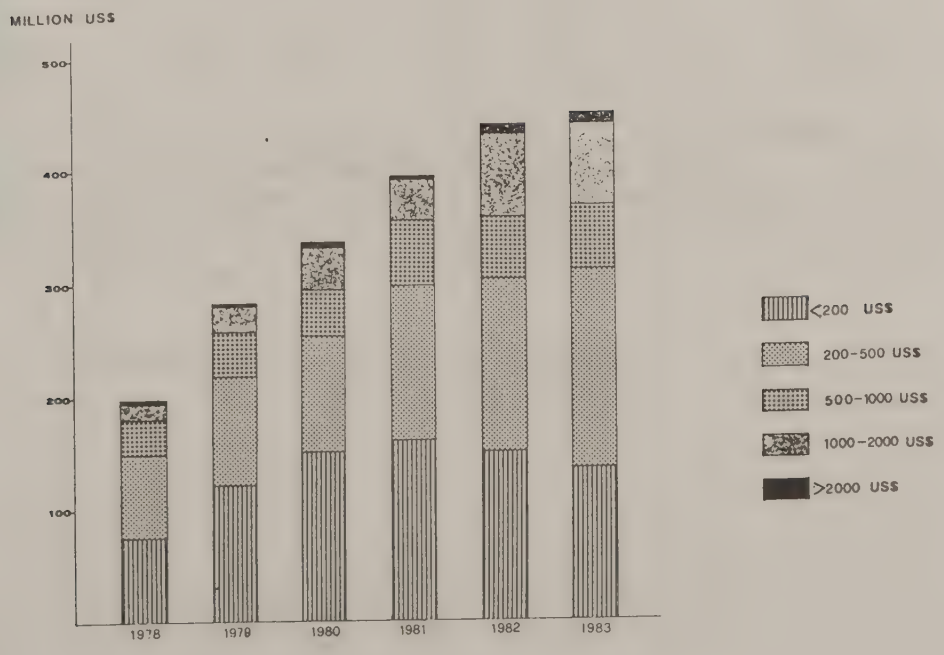

Fig.7 Fisheries assistance by income level of recipient countries

Table 28

Total Assistance to the Fisheries Sector by Income Level of Countries

	1978	1979	1980	1981	1982	1983	1984 a/
< US$ 200	74 151	120 670	148 037	158 436	148 608	135 529	107 684
US$ 200-500	72 043	97 721	103 753	137 555	153 333	175 040	151 607
US$ 500-1000	29 281	40 762	41 175	59 762	58 356	57 692	51 359
US$ 1000-2000	13 260	23 448	37 402	38 145	79 874	75 742	65 779
> US$ 2000	4 895	3 660	4 540	3 536	9 044	10 004	11 111

Table 28 shows a decreasing interest of donor agencies in raising per caput income of countries, but Table 28 has to be seen together with the total population within the income groups which is illustrated by Table 29.

Table 29

Per 1000 Inhabitants Total Assistance by Income Groups (US$)

	1978	1979	1980	1981	1982	1983	1984 a/
< US$ 200	82	134	164	176	164	150	119
US$ 200-500	120	163	173	229	255	292	252
US$ 500-1000	92	127	129	187	183	181	161
US$ 1000-2000	110	195	311	318	662	628	546
> US$ 2000	272	203	252	196	502	555	617

It is interesting to note that the per caput fisheries aid, in the range of US$ 0.1 to 0.2, is quite regularly distributed among the various income groups without preference for the lower income groups 1 and 2. On the contrary, in 1980 to 1983, there is a trend to help the fishing industry more in the relatively rich countries.

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a/ Preliminary

5. FISHERIES AID ALLOCATION BY REGION

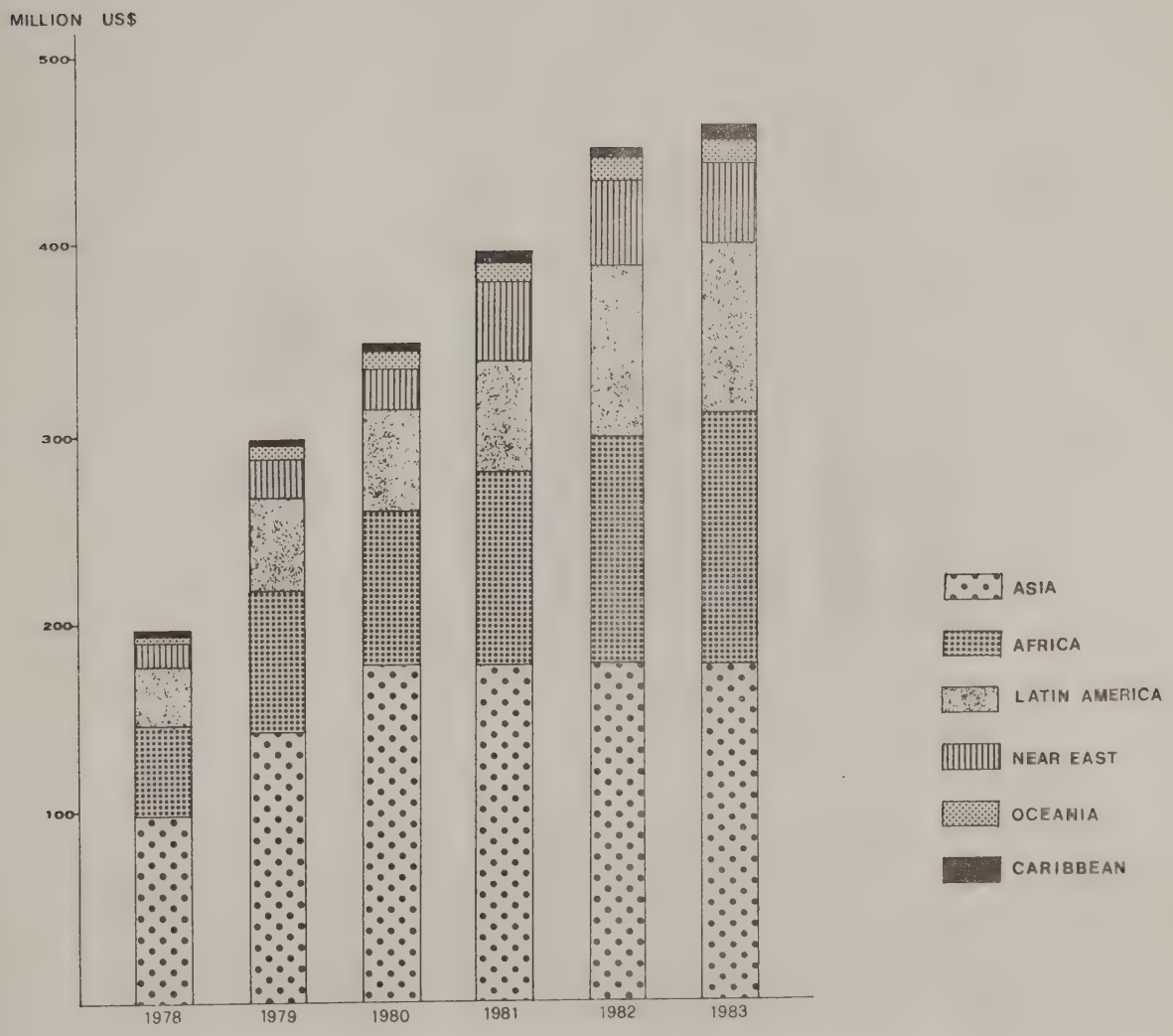


Fig.8 Regional distribution of fisheries assistance

AFRICA

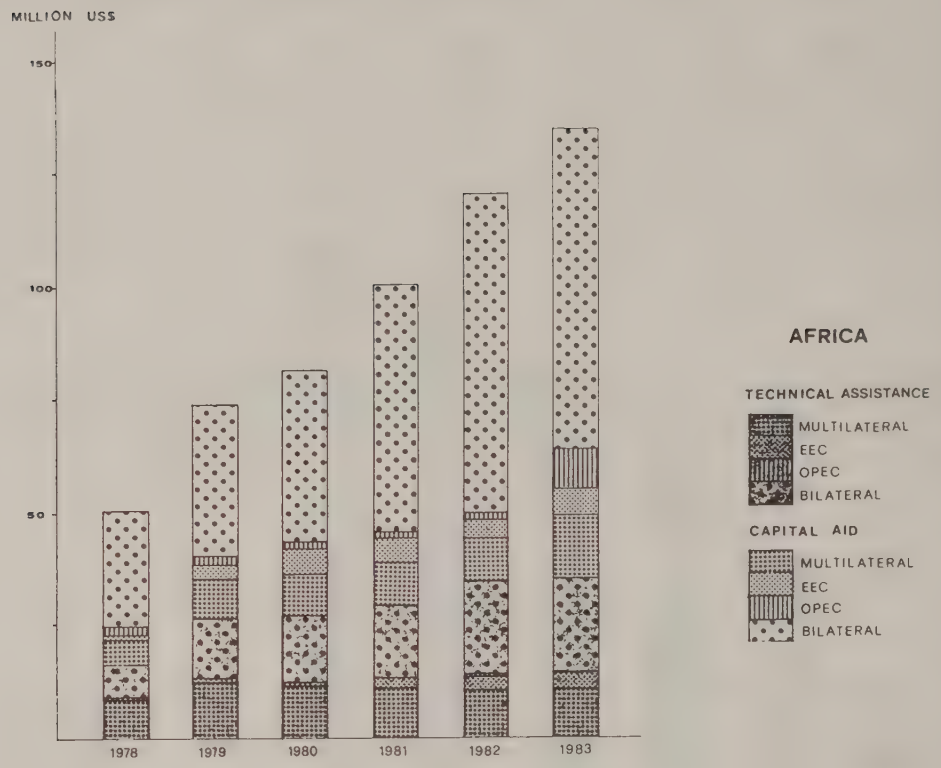
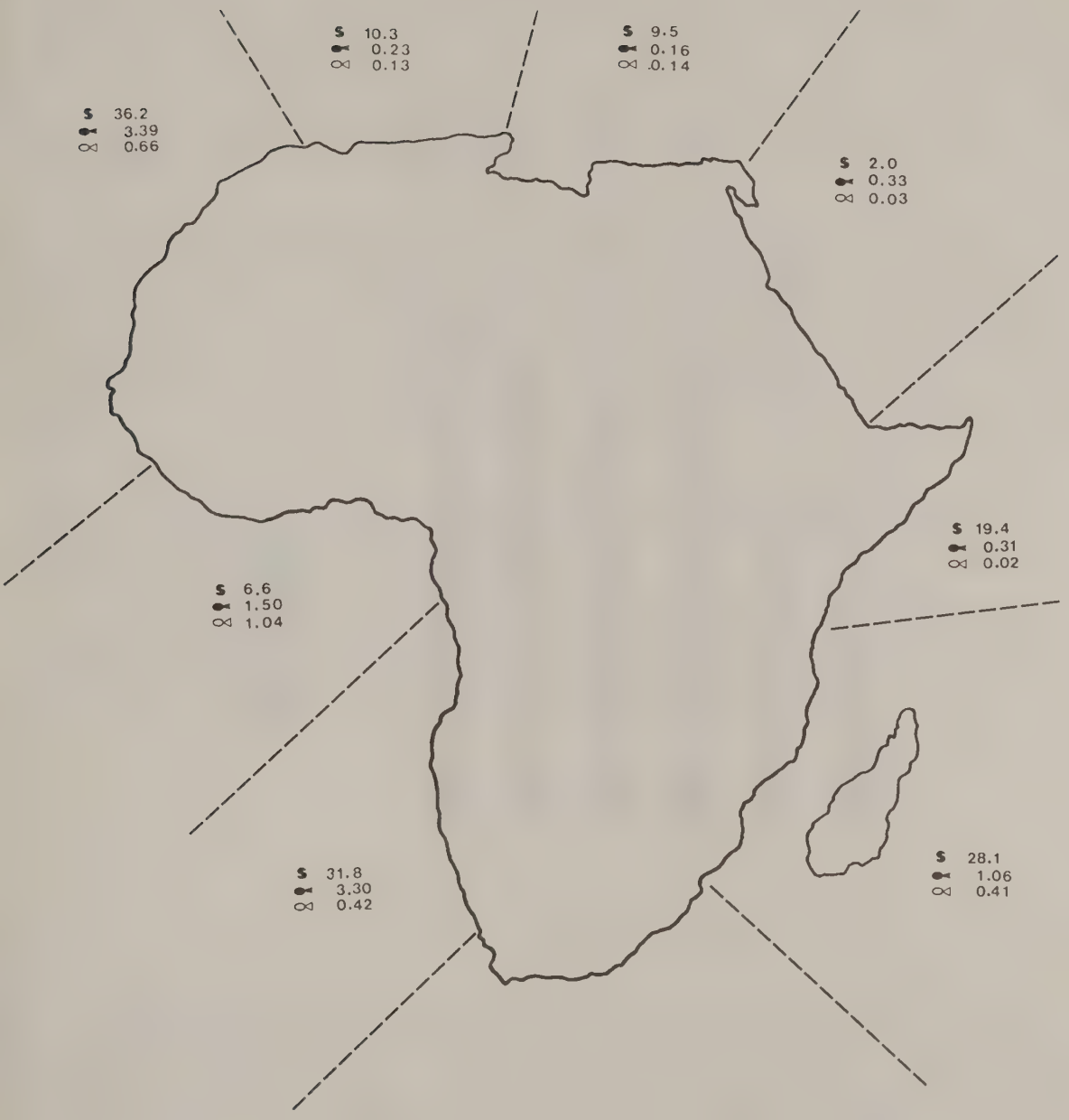


Fig. 9 Fisheries assistance in Africa by type of donors

Africa is the region with the highest share of technical assistance (about 15 percent), which reflects the African countries' need for training in the fisheries sector. Industrial fisheries in Africa are the major recipients of assistance (24 percent), closely followed by small-scale fisheries projects (20 percent) and infrastructure projects (18 percent). The major source of assistance comes from bilateral donors (70 percent), especially Japan, Spain, Italy and Canada, while the EEC accounts for another 7 percent of total assistance to Africa.

About 35 percent of the fisheries assistance going to Africa is allocated in South-West Indian Ocean countries, as compared to 27 percent going to the Northern CECAF countries, while the potential of the latter area is about twice that of the South-West Indian Ocean countries (see figure 10).

This surprising allocation of fisheries aid is mainly due to the fact that Somalia, alone, accounts for 13 percent of total aid going to Africa. The South-East Atlantic is a sub-region recovering from war and the consequent disasters. Fisheries aid to this sub-region has increased steadily during the years under survey, from US$ 9 million in 1980 to US$ 31.8 million in 1983, thus reaching the aid allocation to the Northern CECAF area - an area with the same potential for fisheries development.



$ FISHERIES AID 1983 (MILLION US$)
CATCH POTENTIAL (MILLION MT)
CATCH FIGURES 1982 (MILLION MT)

Fig. 10 Subregional allocation of fisheries assistance and potential in Africa and catch of African developing countries

ASIA

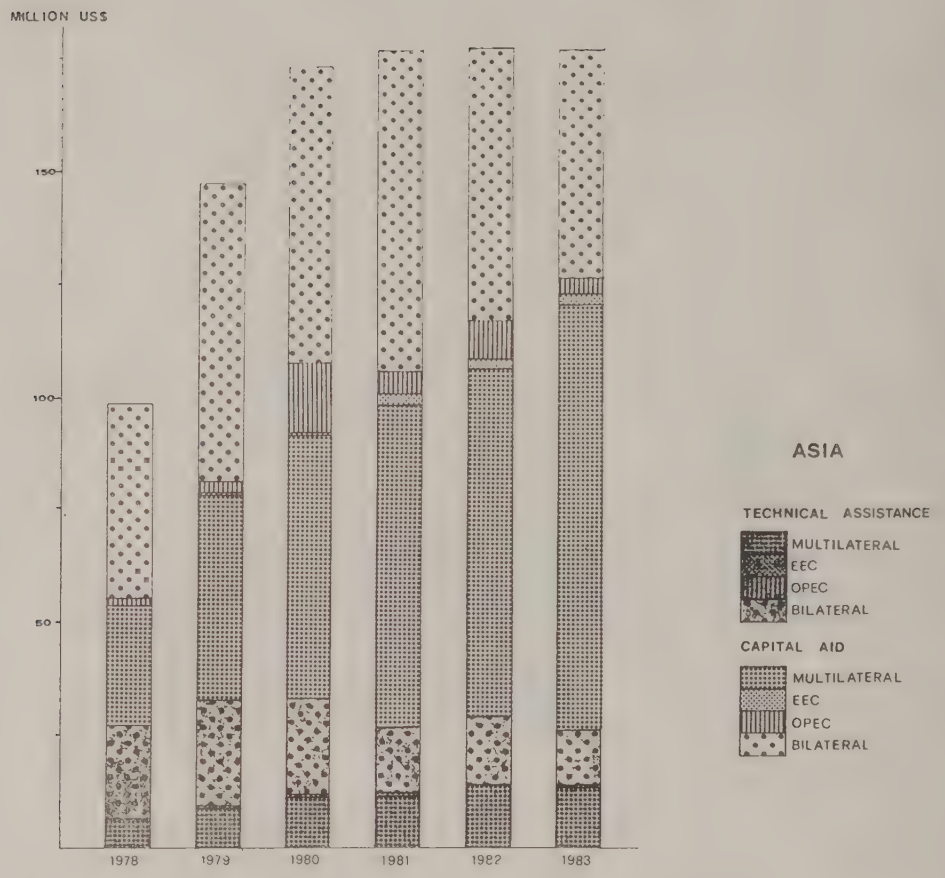


Fig. 11 Fisheries assistance in Asia by type of donors

The share of fisheries aid going to Asia is roughly in line with the production figures of Asian countries which account for about two-thirds of the total catch coming from developing countries. The major recipient of aid to the fisheries sector in Asia is Bangladesh where about 60 fisheries projects have been implemented during the last six years. Non-governmental organizations in particular have assisted the small-scale fisheries of this country.

Japan is the major bilateral donor to the development of the Asian fisheries, assisting capital-intensive harbour projects in the Philippines (a US$ 45.8 million project started in 1978) and in Indonesia (a US$ 39.7 million project commenced in 1980). Japan alone accounts for 24 percent of total fisheries assistance going to Asia.

The Asian Development Bank is the major investor in the development of the fisheries sector in Asia (about 30 percent). One-third of ADB projects in Asia are capital-intensive projects (vessels, fishing harbours); another third comprise

aquaculture projects, and 25 percent of ADB aid is going to small-scale fisheries activities.

More than half of the World Bank's assistance goes to Asia, where it accounts for 22 percent of total fisheries aid. The Philippines (research, training and aquaculture) and India (fishery harbours and aquaculture) are the major recipient of this assistance.

In addition to Japan, Denmark, Norway and the Netherlands are major bilateral donors. Denmark and Norway concentrate on providing fishing and research vessels to Asia, especially Burma, India and Bangladesh. Most of these vessels are built in donor countries, thus representing a notable benefit for their industries. The technical knowledge required for operating some of these vessels is rather high and sufficient technical training is not always provided by the donors. The Dutch, too, have provided trawlers to India in past years, but nowadays their aid concentrates on fish culture activities in Laos.

The external assistance going into the construction of fishing harbours and the provision of fishing vessels received by far the largest share of 1983's aid (35 percent), while small-scale fisheries is receiving 18 percent and aquaculture 17 percent of assistance.

The sub-regional allocation of aid shows that, while Southern Asia is receiving increasing shares of assistance, the fisheries aid going to the East and South-Eastern Asian countries is decreasing. However, the latter is still receiving more than half of the assistance going to the fisheries in Asia.

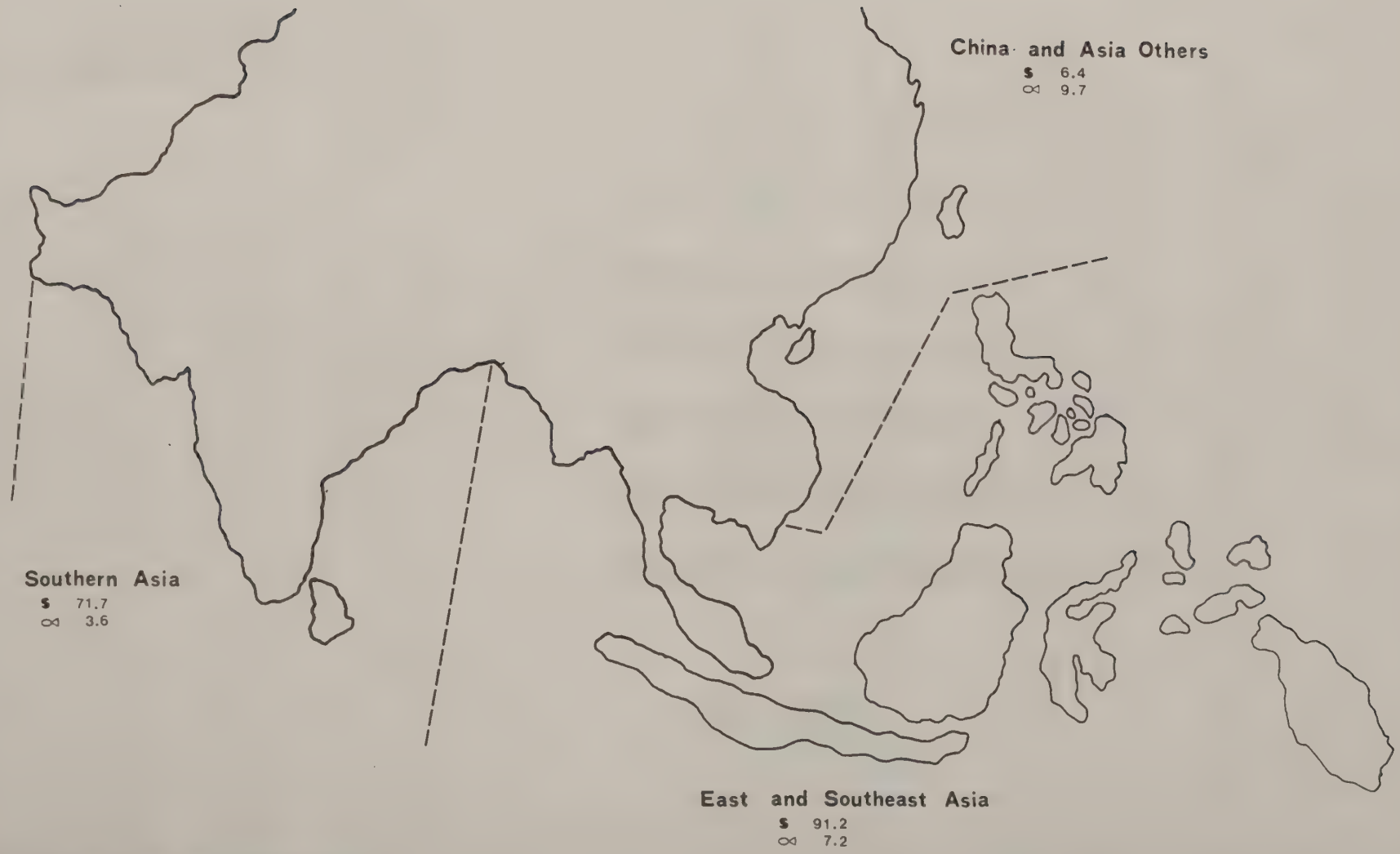


Fig. 12 Subregional allocation of fisheries assistance and catch in Asia

LATIN AMERICA

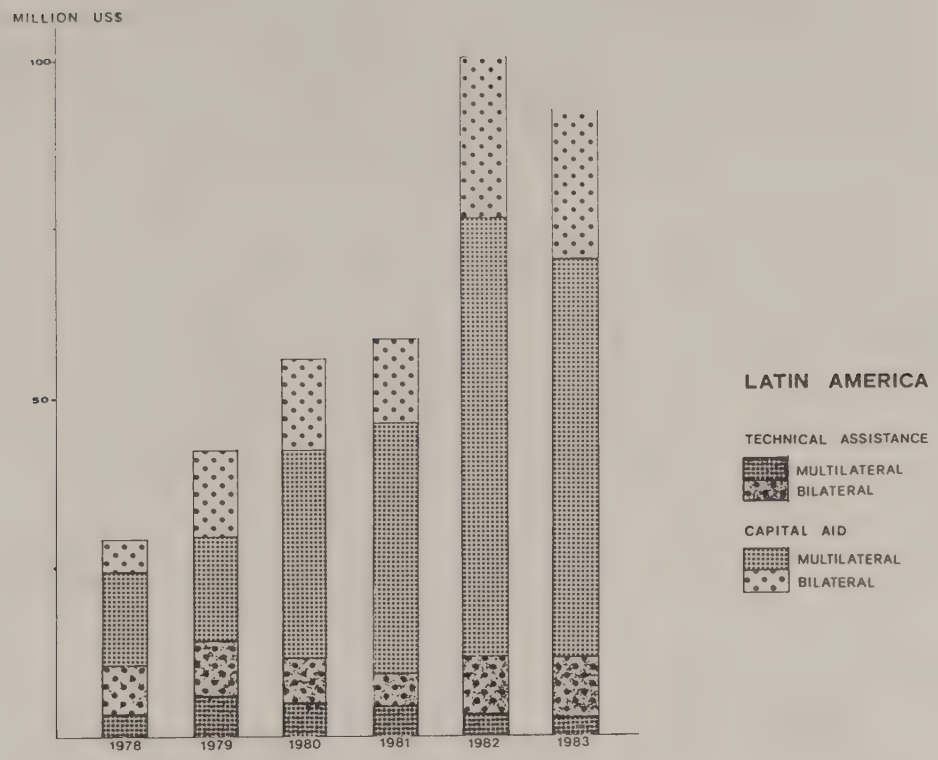


Fig. 13 Fisheries assistance in Latin America by type of donors

The major donor to the development of the Latin American fisheries is by far the Inter-American Development Bank (IDB) accounting for 57 percent of total assistance. A major objective of the IDB policy is to increase the availability of food fish for the local population, thus assisting mainly small-scale fisheries projects. The substantial increase of IDB aid in 1982 was, however, mainly due to the approval of industrial fisheries projects in Peru (two), Panama, Chile, Uruguay and Nicaragua.

The interest of bilateral donors in assisting the Latin American fishing industry has always been low (about 6 percent in 1981), but increased in 1982-84 to about 20 percent of total, reflecting Japanese new inputs in Chile, Peru, Argentina, Brazil and Ecuador.

Small-scale fisheries and industrial fisheries receive the same share (24 percent) of aid going to the fisheries sector, while the provision of infrastructure accounts for about 20 percent. The share of capital input in Latin American fisheries has always been higher than the world average, more than 90 percent of fisheries aid, reflecting the high technical level of the Latin American fishing industry.

Fig. 14 Subregional allocation of fisheries assistance and catch in Latin America

Most of the fisheries assistance going to Latin America concentrates on Central America (42 percent) and on the Atlantic coast of South America (37 percent), though the Pacific coast of South America is the area with the highest fish catch. The multilateral and bilateral donors evidently prefer the Atlantic coast or Central America as there are more possibilities for development, while the Pacific fisheries are already highly industrialized.

STATISTICAL APPENDIX

REGIONAL AND SUB-REGIONAL DATA

The tables which follow include interregional and regional projects only in the regional tables. However, these projects are excluded from the sub-regional tables in view of the difficulties that would have been encountered in properly allocating the aid so provided.

AFRICA

The tables below present the data for Africa according to seven sub-regions, of which the first four are sub-regions of coastal countries, the last three land-locked. The first group - North-East Central Atlantic - includes the West African coastal countries from Mauritania in the north down to Sierra Leone. The Gulf of Guinea countries include Liberia in the west and Nigerian in the east. The third group - South-East Atlantic - lists all remaining Atlantic coastal countries. The fourth group - South West Indian Ocean - is defined as all African countries which border the Indian Ocean. In the southern land-locked countries group Botswana, Lesotho and Swaziland are listed, while the eastern land-locked group contains Burundi, Rwanda, Zambia, Uganda and Malawi; the remaining land-locked countries are defined as the "Central African land-locked countries".

Table AF.1

Fisheries assistance in Africa at current values (US$'000)

	1978	1979	1980	1981	1982	1983	1984[a/]
TECHNICAL ASSISTANCE	16 202	26 400	27 341	29 862	34 803	35 446	30 437
Multilateral	8 608	12 571	11 876	11 016	10 787	10 865	9 475
EEC	322	539	643	2 793	3 039	3 886	6 546
OPEC	100	108	108	108	410	10	10
Bilateral	7 172	13 181	14 714	15 945	20 567	20 685	14 406
CAPITAL AID	35 017	49 176	54 312	72 257	85 898	99 358	70 342
Multilateral	5 748	9 986	9 525	9 425	9 562	13 980	13 960
EEC	1 126	3 259	5 664	5 664	4 046	5 966	8 266
OPEC	2 600	2 600	1 999	1 799	1 799	8 500	8 450
Bilateral	25 543	33 331	37 124	55 369	70 491	70 912	39 666
Total:	51 219	75 576	81 653	102 119	120 701	134 804	100 779

a/ preliminary

Table AF.2

Fisheries assistance in Africa at 1978 prices (US$'000) and annual variations (%)

	1978	1979	1980	1981	1982	1983
TECHNICAL ASSISTANCE	16 202	23 784	22 784	25 094	29 494	30 296
Annual variation (%)		+47	-4	+10	+18	+3
CAPITAL AID	35 017	44 302	45 260	60 720	72 795	84 921
Annual variation (%)		+26	+2	+34	+20	+17
Total:	51 219	68 086	68 044	85 814	102 289	115 217
Annual variation (%)		+33	-	+26	+19	+13

Table AF.3

The sub-regional allocation of fisheries aid (US$'000)

North-Central Atlantic (Western Africa)

	1978	1979	1980	1981	1982	1983	1984[a/]
TECHNICAL ASSISTANCE	6 441	7 711	8 516	10 016	8 554	10 275	7 770
Multilateral	2 912	3 750	2 741	1 967	1 623	1 505	1 001
EEC	322	322	322	1 822	717	700	600
OPEC	100	100	100	100	0	0	0
Bilateral	3 107	3 539	5 353	6 127	6 214	8 070	6 169
CAPITAL AID	17 888	27 667	29 203	25 035	26 446	25 896	16 095
Multilateral	3 000	4 738	2 500	2 500	1 770	2 770	2 770
EEC	0	1 500	3 100	3 100	2 000	1 200	2 350
OPEC	2 400	2 400	1 799	1 799	1 799	1 900	1 900
Bilateral	12 488	19 029	21 804	17 636	20 877	20 026	9 075
Total:	24 329	35 378	37 719	35 050	35 000	36 171	23 865

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a/ preliminary

Gulf of Guinea

	1978	1979	1980	1981	1982	1983	1984[a/]
TECHNICAL ASSISTANCE	1 149	1 801	1 621	1 318	1 797	1 984	973
Multilateral	1 111	1 495	1 355	1 035	1 177	991	340
EEC	0	217	217	217	477	840	580
OPEC	0	0	0	0	0	0	0
Bilateral	38	89	49	66	143	153	53
CAPITAL AID	1 460	4 347	1 969	3 518	3 993	4 643	2 743
Multilateral	0	0	111	111	428	1 078	1 078
EEC	0	0	0	0	0	0	0
OPEC	0	0	0	0	0	0	0
Bilateral	1 460	4 347	1 858	3 407	3 565	3 565	1 665
Total:	2 609	6 148	3 590	4 836	5 790	6 627	3 716

South-East Atlantic

	1978	1979	1980	1981	1982	1983	1984[a/]
TECHNICAL ASSISTANCE	1 321	5 197	5 738	6 254	8 422	7 929	9 240
Multilateral	0	0	0	516	593	773	627
EEC	0	0	100	100	439	100	3 300
OPEC	0	0	0	0	0	0	0
Bilateral	1 321	5 197	5 638	5 638	7 390	7 056	5 313
CAPITAL AID	1 323	2 433	3 355	5 845	9 768	23 826	25 836
Multilateral	48	48	48	3 648	1 748	3 500	3 500
EEC	0	0	522	522	130	100	1 950
OPEC	0	0	0	0	0	6 500	6 550
Bilateral	1 275	2 385	2 785	1 675	7 890	13 726	13 836
Total:	2 644	7 630	9 093	12 099	18 190	31 755	35 076

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a/ Preliminary

South-West Indian Ocean

	1978	1979	1980	1981	1982	1983	1984[a/]
TECHNICAL ASSISTANCE	4 537	6 441	5 976	4 915	8 730	7 053	4 669
Multilateral	2 770	3 928	4 331	3 461	4 227	4 382	2 993
EEC	0	0	0	0	426	406	386
OPEC	0	8	8	8	410	10	10
Bilateral	1 767	2 505	1 637	1 446	3 667	2 255	1 280
CAPITAL AID	11 820	12 203	16 976	36 450	41 278	40 480	21 955
Multilateral	1 500	4 000	5 666	3 166	4 486	5 502	5 482
EEC	0	633	633	633	933	3 683	3 683
OPEC	0	0	0	0	0	0	0
Bilateral	10 320	7 570	10 677	32 651	35 859	31 295	12 790
Total:	16 357	18 644	22 952	41 365	50 008	47 533	26 624

Land-locked Southern Africa

	1978	1979	1980	1981	1982	1983	1984
TECHNICAL ASSISTANCE	97	33	33	39	0	0	0
Multilateral	0	0	0	0	0	0	0
EEC	0	0	0	0	0	0	0
OPEC	0	0	0	0	0	0	0
Bilateral	97	33	33	39	0	0	0
CAPITAL AID	0	0	0	0	0	0	0
Total:	97	33	33	39	0	0	0

Land-locked Central Africa

	1978	1979	1980	1981	1982	1983	1984[a/]
TECHNICAL ASSISTANCE	850	1 523	1 809	2 459	2 763	2 171	1 560
Multilateral	589	1 262	1 411	1 411	1 531	1 041	800
EEC	0	0	4	4	330	240	80
OPEC	0	0	0	0	0	0	0
Bilateral	261	261	394	1 044	902	890	680
CAPITAL AID	1 126	1 126	1 126	1 126	700	700	0
Multilateral	0	0	0	0	0	0	0
EEC	1 126	1 126	1 126	1 126	700	700	0
OPEC	0	0	0	0	0	0	0
Bilateral	0	0	0	0	0	0	0
Total:	1 976	2 649	2 935	3 585	3 463	2 871	1 560

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a/ preliminary

Land-locked Eastern Africa

	1978	1979	1980	1981	1982	1983	1984[a/]
TECHNICAL ASSISTANCE	1 084	1 547	1 844	1 540	1 366	1 274	1 769
Multilateral	503	739	919	668	625	523	1 088
EEC	0	0	0	0	0	0	0
OPEC	0	0	0	0	0	0	0
Bilateral	581	808	925	872	741	751	681
CAPITAL AID	1 400	1 400	1 683	283	3 713	3 813	3 713
Multilateral	1 200	1 200	1 200	0	1 130	1 130	1 130
EEC	0	0	283	283	283	283	283
OPEC	200	200	200	0	0	100	0
Bilateral	0	0	0	0	2 300	2 300	2 300
Total:	2 484	2 947	3 527	1 823	5 079	5 087	5 482

NEAR EAST

The Near East region has been divided into three sub-regions, where the "Northwest African countries" include Morocco, Algeria and Tunisia, while "Near East Africa" lists Egypt, Libya, Sudan and Djibouti. The third category contains the Arabian Peninsula and Iran, Iraq and Syria.

Table NE.1

Fisheries assistance in the Near East, at current values (US$'000)

	1978	1979	1980	1981	1982	1983	1984[a/]
TECHNICAL ASSISTANCE	4 929	8 245	4 813	8 095	13 291	12 721	9 564
Multilateral	2 917	5 958	3 631	2 560	4 292	4 098	2 191
EEC	0	0	0	0	360	360	160
OPEC	0	0	130	130	130	130	130
Bilateral	2 012	2 287	1 052	5 405	8 509	8 133	7 083
CAPITAL AID	8 198	10 562	16 567	34 170	31 508	32 175	36 530
Multilateral	3 375	5 426	9 551	16 351	15 806	17 811	17 811
EEC	0	0	0	600	600	600	600
OPEC	4 302	4 302	4 302	10 330	9 692	6 520	6 520
Bilateral	521	834	2 714	6 889	5 410	7 244	11 599
Total:	13 127	18 807	21 380	42 265	44 799	44 896	46 094

a/ preliminary

Table NE.2

Fisheries assistance in the Near East at 1978 values (US$'000) and annual variations (%)

	1978	1979	1980	1981	1982	1983
TECHNICAL ASSISTANCE	4 929	7 428	4 011	6 803	11 264	10 873
Annual variation (%)		+51	-46	+70	+66	-3
CAPITAL AID	8 198	9 505	13 806	28 714	26 703	27 500
Annual variation (%)		+16	+45	+108	-7	+3
Total:	13 127	16 943	17 817	35 517	37 965	38 373
Annual variation (5)		+29	+5	+99	+7	+1

Table NE.3

The sub-regional allocation of fisheries aid (US$'000)

Northwest African Countries

	1978	1979	1980	1981	1982	1983	1984[a/]
TECHNICAL ASSISTANCE	963	1 690	333	676	1 488	1 240	1 040
Multilateral	344	1 357	287	250	342	470	470
EEC	0	0	0	0	200	200	0
OPEC	0	0	0	0	0	0	0
Bilateral	619	333	46	426	946	570	570
CAPITAL AID	872	5 256	5 256	12 219	9 113	9 081	13 876
Multilateral	0	4 071	4 071	4 071	4 071	4 071	4 071
EEC	0	0	0	0	0	0	0
OPEC	552	552	552	3 340	2 702	3 280	3 280
Bilateral	320	633	633	4 808	2 340	1 730	6 525
Total:	1 835	6 946	5 589	12 895	10 601	10 321	14 916

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a/ preliminary

Near East - Africa

	1978	1979	1980	1981	1982	1983	1984 a/
TECHNICAL ASSISTANCE	534	1 996	904	5 331	6 709	6 719	5 894
Multilateral	245	1 242	450	352	336	346	321
EEC	0	0	0	0	160	160	160
OPEC	0	0	0	0	0	0	0
Bilateral	289	754	454	4 979	6 213	6 213	5 413
CAPITAL AID	201	681	1 406	4 206	4 650	4 650	4 210
Multilateral	0	480	1 205	4 005	3 460	3 460	3 460
EEC	0	0	0	0	0	0	0
OPEC	0	0	0	0	0	0	0
Bilateral	201	201	201	201	1 190	1 190	750
Total:	735	2 677	2 310	9 537	11 359	11 369	10 104

Near East - Asia

	1978	1979	1980	1981	1982	1983	1984 a/
TECHNICAL ASSISTANCE	1 352	1 829	1 456	438	1 984	1 902	1 430
Multilateral	248	629	774	308	504	422	200
EEC	0	0	0	0	0	0	0
OPEC	0	0	130	130	130	130	130
Bilateral	1 104	1 200	552	0	1 350	1 350	1 100
CAPITAL AID	7 125	4 625	9 905	17 745	17 745	18 444	18 444
Multilateral	3 375	875	4 275	8 275	8 275	10 280	10 280
EEC	0	0	0	600	600	600	600
OPEC	3 750	3 750	3 750	6 990	6 990	3 240	3 240
Bilateral	0	0	1 880	1 880	1 880	4 324	4 324
Total:	8 477	6 454	11 361	18 183	19 729	20 346	19 874

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a/ preliminary

CARIBBEAN

This area covers 22 island countries and territories in the Western Central Atlantic Ocean.

Table CA.1

Fisheries assistance in the Caribbean at current values (US$'000)

	1978	1979	1980	1981	1982	1983	1984 a/
TECHNICAL ASSISTANCE	2 037	3 100	3 031	2 880	2 255	1 702	906
Multilateral	1 593	1 529	1 503	990	642	814	354
EEC	0	0	0	0	40	40	40
OPEC	0	0	0	0	0	0	0
Bilateral	444	1 571	1 528	1 890	1 573	848	512
CAPITAL AID	1 482	1 572	1 730	3 842	3 748	5 586	5 556
Multilateral	228	228	1 224	1 224	2 444	2 794	2 874
EEC	109	154	154	466	404	562	562
OPEC	645	645	0	0	0	0	0
Bilateral	500	500	352	2 152	900	2 230	2 120
Total:	3 519	4 627	4 761	6 722	6 003	7 288	6 462

Table CA.2

Fisheries assistance in the Caribbean at 1978 values (US$'000) and annual variations (%)

	1978	1979	1980	1981	1982	1983
TECHNICAL ASSISTANCE	2 037	2 793	2 526	2 420	1 911	1 455
Annual variation (%)		+37	-10	-4	-21	-24
CAPITAL AID	1 482	1 416	1 442	3 229	3 176	4 774
Annual variation (%)		-4	+2	+124	-2	+50
Total:	3 519	4 168	3 968	5 649	5 087	6 229
Annual variation (%)		+18	-5	+42	-10	+22

a/ preliminary

OCEANIA

This regional grouping includes 27 developing island or archipelagic states, scattered over a very vast water surface in the Pacific Ocean, ranging from Melanesia to Micronesia and Polynesia.

Table OC.1

Fisheries assistance in Oceania at current values (US$'000)

	1978	1979	1980	1981	1982	1983	1984[a/]
TECHNICAL ASSISTANCE	2 192	3 835	3 190	2 933	4 046	3 111	2 326
Multilateral	829	1 511	1 130	1 066	1 075	962	627
EEC	157	357	507	507	1 208	908	723
OPEC	0	0	0	0	0	0	0
Bilateral	1 206	1 967	1 553	1 360	1 763	1 241	976
CAPITAL AID	1 261	4 130	4 696	6 615	8 221	9 526	8 850
Multilateral	706	2 226	2 226	2 226	2 220	3 460	4 750
EEC	0	140	116	1 866	0	0	920
OPEC	0	0	0	0	0	0	0
Bilateral	555	1 764	2 354	2 523	6 021	6 066	3 180
Total:	3 453	7 965	7 886	9 548	12 267	12 637	11 176

Table OC.2

Fisheries assistance in Oceania at 1978 values (US$'000) and annual variations (%)

	1978	1979	1980	1981	1982	1983
TECHNICAL ASSISTANCE	2 192	3 455	2 658	2 465	3 429	2 659
Annual variation (%)		+58	-23	-7	+39	-22
CAPITAL AID	1 261	3 721	3 913	5 559	6 967	8 142
Annual variation (%)		+200	+5	+42	+25	+17
Total:	3 453	7 176	6 571	8 024	10 396	10 801
Annual variation (%)		+108	-8	+22	+30	+4

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a/ preliminary

ASIA

Asia has been divided into three sub-regions, following not only the geographical but also political aspects of the region. The first group consists of Southern Asian countries as classified in the FAO Yearbook of Fishery Statistics, but the second group - East and South-East Asia - does not include the Democratic Republic of Korea and Lao, which have been placed into the "China (Mainland) and Asia, Other"group.

Table AS.1

Fisheries Assistance in Asia at current values (US$'000)

	1978	1979	1980	1981	1982	1983	1984[a/]
TECHNICAL ASSISTANCE	26 907	32 691	33 356	26 162	29 534	26 203	21 374
Multilateral	6 192	8 761	11 185	11 298	14 123	13 570	10 261
EEC	0	350	750	750	29	390	492
OPEC	0	0	0	0	0	0	0
Bilateral	20 715	23 580	21 421	14 114	15 382	12 243	10 621
CAPITAL AID	71 562	113 880	140 217	150 448	148 965	150 868	130 497
Multilateral	26 526	45 590	58 576	71 556	77 650	94 605	91 864
EEC	0	202	202	2 602	2 586	2 586	2 586
OPEC	1 400	2 525	15 431	4 991	8 471	3 791	2 666
Bilateral	43 636	65 563	66 008	71 299	60 258	49 886	33 381
Total:	98 469	146 571	173 573	176 610	178 499	177 071	151 871

Table AS.2

Fisheries Assistance in Asia at 1978 values (US$'000) and annual variations (%)

	1978	1979	1980	1981	1982	1983
TECHNICAL ASSISTANCE	26 907	29 451	27 797	21 985	25 029	22 396
Annual variation (%)		+10	-6	-21	+14	-11
CAPITAL AID	71 562	102 595	116 848	126 427	126 242	128 947
Annual variation (%)		+43	+14	+8		+2
Total:	98 469	132 046	144 644	148 412	151 270	151 342
Annual variation (%)		+34	+10	+3	+2	-

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a/ Preliminary

Table AS.3

The Sub-regional Allocation of Fisheries Aid (US$'000)

	1978	1979	1980	1981	1982	1983	1984[a/]
Southern Asia							
TECHNICAL ASSISTANCE	14 892	15 408	12 611	7 126	9 139	7 036	6 504
Multilateral	2 844	3 921	3 652	1 964	5 231	4 255	3 981
EEC	0	350	0	0	0	0	492
OPEC	0	0	0	0	0	0	0
Bilateral	12 048	11 137	8 959	5 162	3 908	2 781	2 031
CAPITAL AID	19 227	32 352	47 282	50 921	64 298	64 654	60 788
Multilateral	10 440	16 575	20 412	30 592	34 888	40 863	39 842
EEC	0	0	0	2 400	2 400	2 400	2 400
OPEC	0	0	12 906	2 466	5 946	2 666	2 666
Bilateral	8 787	15 777	13 964	15 463	21 064	18 725	15 880
Total:	34 119	47 760	59 893	58 047	73 437	71 690	67 292
East and South-East Asia[1/]							
TECHNICAL ASSISTANCE	5 694	8 998	10 996	9 927	11 901	13 610	10 887
Multilateral	2 205	2 206	2 393	4 605	5 136	6 004	3 950
EEC	0	0	0	0	29	0	0
OPEC	0	0	0	0	0	0	0
Bilateral	3 489	6 792	8 603	5 322	6 736	7 606	6 937
CAPITAL AID	48 623	73 516	84 923	91 515	75 369	77 618	66 643
Multilateral	16 086	25 115	34 364	37 164	37 292	45 272	49 022
EEC	0	202	202	202	186	186	186
OPEC	0	1 125	1 125	1 125	1 125	1 125	0
Bilateral	32 537	47 074	49 232	53 024	36 766	31 035	17 435
Total:	54 317	82 514	95 919	101 442	87 270	91 228	77 530
China (Mainland) and Asia, Other							
TECHNICAL ASSISTANCE	5 501	6 075	5 825	5 419	4 101	994	683
Multilateral	493	784	1 596	1 529	921	496	200
EEC	0	0	750	750	0	0	0
OPEC	0	0	0	0	0	0	0
Bilateral	5 008	5 291	3 479	3 140	3 180	498	483
CAPITAL AID	3 712	8 012	8 012	8 012	9 148	5 436	66
Multilateral	0	3 800	3 800	3 800	5 370	5 370	0
EEC	0	0	0	0	0	0	0
OPEC	1 400	1 400	1 400	1 400	1 400	0	0
Bilateral	2 312	2 812	2 812	2 812	2 378	66	66
Total:	9 213	14 087	13 837	13 431	13 249	6 430	749

1/ Excludes the Democratic Republic of Korea and Lao, which have been included with China (Mainland) and Asia, Other.

a/ Preliminary

LATIN AMERICA

The tables which follow refer exclusively to continental countries in Central and South America. In the latter, the group of the Pacific States comprises Ecuador, Peru and Chile, while Colombia is identified under the Atlantic coastal States.

Table LA.1

Fisheries Assistance in Latin America at current values (US$'000)

	1978	1979	1980	1981	1982	1983	1984[a/]
TECHNICAL ASSISTANCE	10 467	13 684	10 708	8 813	10 772	10 035	5 742
Multilateral	3 643	4 700	4 265	3 937	3 121	2 179	1 479
EEC	63	63	0	0	90	100	0
OPEC	0	0	0	0	0	0	0
Bilateral	6 761	8 921	6 443	4 876	7 561	7 756	4 263
CAPITAL AID	18 641	28 119	45 432	50 380	90 264	83 095	76 774
Multilateral	13 583	15 903	31 466	37 031	66 798	60 484	57 868
EEC	224	399	399	399	295	120	870
OPEC	0	0	0	0	0	0	0
Bilateral	4 834	11 817	13 567	12 950	23 171	22 491	18 036
Total:	29 108	41 803	56 140	59 193	101 036	93 130	82 516

Table LA.2

Fisheries Assistance in Latin America at 1978 values (US$'000) and annual variations (%)

	1978	1979	1980	1981	1982	1983
TECHNICAL ASSISTANCE	10 467	12 328	8 923	7 406	9 129	8 577
Annual variation (%)		+18	-28	-17	+23	-6
CAPITAL AID	18 641	25 332	37 860	42 336	76 495	71 021
Annual variation (%)		+36	+49	+12	+81	-7
Total:	29 108	37 660	46 783	49 742	85 624	79 598
Annual variation (%)		+29	+24	+6	+72	-7

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a/ preliminary

Table LA.3

The Sub-regional Allocation of Fisheries Aid (US$'000)

Central America

	1978	1979	1980	1981	1982	1983	1984[a/]
TECHNICAL ASSISTANCE	2 757	2 920	2 330	1 583	3 118	2 450	518
Multilateral	1 529	1 625	1 408	1 052	900	168	92
EEC	0	0	0	0	0	0	0
OPEC	0	0	0	0	0	0	0
Bilateral	1 228	1 295	922	531	2 218	2 282	426
CAPITAL AID	10 854	11 274	11 407	11 407	39 714	36 206	35 859
Multilateral	10 630	11 050	11 183	11 183	29 628	26 120	25 773
EEC	224	224	224	224	120	120	120
OPEC	0	0	0	0	0	0	0
Bilateral	0	0	0	0	9 966	9 966	9 966
Total:	13 611	14 194	13 737	12 990	42 832	38 656	36 377

South America - Pacific

TECHNICAL ASSISTANCE	3 316	4 226	2 174	2 062	1 619	1 414	1 355
Multilateral	194	383	313	313	144	14	0
EEC	0	0	0	0	0	0	0
OPEC	0	0	0	0	0	0	0
Bilateral	3 122	3 843	1 861	1 749	1 475	1 400	1 355
CAPITAL AID	3 220	6 533	8 683	11 583	9 545	7 569	7 370
Multilateral	2 820	2 820	4 970	7 870	7 945	5 119	5 000
EEC	0	0	0	0	0	0	0
OPEC	0	0	0	0	0	0	0
Bilateral	400	3 713	3 713	3 713	1 600	2 450	2 370
Total:	6 536	10 759	10 857	13 645	11 164	8 983	8 725

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a/ preliminary

South America - Atlantic

	1978	1979	1980	1981	1982	1983	1984[a/]
TECHNICAL ASSISTANCE	3 172	5 052	4 699	3 709	2 270	1 999	1 729
Multilateral	970	1 478	1 311	1 345	887	717	647
EEC	63	63	0	0	90	100	0
OPEC	0	0	0	0	0	0	0
Bilateral	2	3 511	3 388	2 364	1 293	1 182	1 082
CAPITAL AID	4 567	10 312	25 342	27 390	35 135	29 940	26 545
Multilateral	133	2 033	15 313	17 978	24 185	24 205	24 105
EEC	0	175	175	175	175	0	750
OPEC	0	0	0	0	0	0	0
Bilateral	4 434	8 104	9 854	9 237	10 775	5 735	1 690
Total:	7 739	15 364	30 041	31 099	37 405	31 939	28 274

South America - Land-locked Countries

TECHNICAL ASSISTANCE	190	190	190	150	2 493	3 070	1 520
Multilateral	0	0	0	0	0	260	120
EEC	0	0	0	0	0	0	0
OPEC	0	0	0	0	0	0	0
Bilateral	190	190	190	150	2 493	2 810	1 400
CAPITAL AID	0	0	0	0	5 540	9 050	7 000
Multilateral	0	0	0	0	5 040	5 040	2 990
EEC	0	0	0	0	0	0	0
OPEC	0	0	0	0	0	0	0
Bilateral	0	0	0	0	500	4 010	4 010
Total:	190	190	190	150	8 033	12 120	8 520

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a/ preliminary